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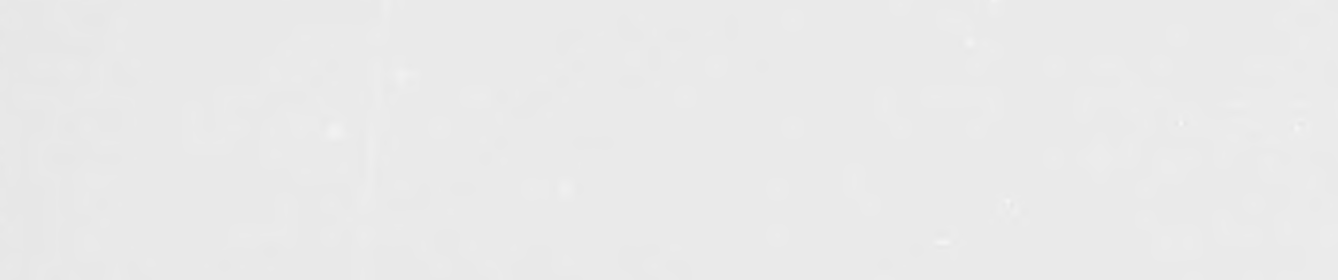

HOMESHARING: A HOUSING ALTERNATIVE FOR SENIORS

1989

Prepared for:

The Society for the Retired
and Semi-Retired

Prepared by:

Sintra Group Inc.

The views and conclusions expressed and the recommendations made in this report are entirely those of the authors and should not be construed as expressing the opinions of Albert Municipal Affairs.

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FOREWORD

The project documented in this report received funding under the Innovative Housing Grants Program of Alberta Municipal Affairs. The Innovative Housing Grants Program is intended to encourage and assist housing research and development which will reduce housing costs, improve the quality and performance of dwelling units and subdivisions, or increase the long term viability and competitiveness of Alberta's housing industry.

The Program offers assistance to builders, developers, consulting firms, professionals, industry groups, building products manufacturers, municipal governments, educational institutions, non-profit groups and individuals. At this time, priority areas for investigation include building design, construction technology, energy conservation, site and subdivision design, site servicing technology, residential building product development or improvement and information technology.

As the type of project and level of resources vary from applicant to applicant, the resulting documents are also varied. Comments and suggestions on this report are welcome. Please send comments or requests for further information to:

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EXECUTIVE SUMMARY

Purpose of the Study

The purpose of this study was to test the homesharing alternative through a pilot program and to recommend on the appropriateness and feasibility of the concept and on conditions and procedures for implementing it. The results of the project are presented in this report; a homesharing manual supplements the report with detailed information for those parties wishing to establish a homesharing program.

For the purpose of this study, ***homesharing*** was defined as a housing arrangement in which two or more unrelated people pool some of their personal and financial resources in order to share a home. Typically, a home owner wants to share his/her home with a person who will contribute to the housing costs and, in some cases, exchange services for rent.

Pilot Program

The Edmonton Homesharing Pilot Program ran from September 15, 1987 to September 15, 1988.

The program initially focused on ***peer*** matches (seniors sharing with seniors) but evolved to include an ***intergenerational*** one (younger people or seniors sharing with seniors) in response to community need. The program does, however, require one of the homesharers in a match to be a senior (i.e., 55 years or older). Eligibility criteria were set according to the program goals and the target markets most in need of this service.

The Edmonton Homesharing Pilot Program was based on the Counselling Model developed by the Shared Housing Resource Center in Philadelphia. This model provides a larger scope of services than a matching service and as such, has proven more likely to produce satisfying and compatible matches.

Established operational procedures included procedures for staffing and volunteers, program implementation, education, and marketing. Detailed operational procedures are presented in the Homesharing Manual which supplements this report.

The Homesharing Program was advertised and promoted through various means such as feature articles, radio and television announcements, information packages, and posters. Liason was also established among various community agencies and organizations who could refer candidates to the Homesharing Program.

Major Conclusions

Three measures indicated a need for a homesharing program in Edmonton -- a survey of older persons, interviews with individuals working in the field of seniors' housing, and the number of applicants to the program.

Most seniors wish to remain in their own homes but may experience some difficulties (eg., loneliness, isolation, safety concerns, maintenance problems, low income, and household responsibilities). Homesharing, which often involves an exchange of services for rent, can alleviate some of these difficulties. Homesharing is another option in the provision of affordable accommodation.

Program Evaluation

The program was evaluated in qualitative terms as well as assessed for its cost-effectiveness. The results were positive and goals were generally met by the pilot program. The program has the potential to become cost-effective within the next two years. Other jurisdictions indicated that it generally requires three years for a homesharing program to become fully functional.

Recommendations

There is a need for more housing options to fill the gap between independent living and institutional care. Homesharing can be a cost-effective program which allows seniors to remain independent and self-sufficient through a self-help approach. Homesharing also allows seniors to remain in their own homes over a longer period of time; thus it can decrease the utilization of subsidized housing, institutional care, and support services. Intergenerational programs can also serve the needs of a variety of adults, including students.

The Edmonton Homesharing Pilot Program experience was a positive one. The program is a needed and feasible one which offers seniors, and others in the community, another housing option. Within the next two years (the program is now funded from Health and Welfare Canada's Seniors Independence Program), the Edmonton Homesharing Program will be fully functional. This time frame will be spent refining the operational procedures, computerizing, increasing the compatibility of matches, training and using the services of senior volunteers, increasing the awareness of homesharing, promoting the program, and balancing the pool of applicants. It is anticipated that the program will become as cost-effective as other Canadian homesharing programs during this period.

1.0 INTRODUCTION

1.1 Purpose of the Study
1.2 Scope and Focus of the Study
1.3 Statement of the Problem
1.4 Terminology and Definitions
1.5 Study Approach
1.6 Report Structure

1.0 INTRODUCTION

This report documents a one year pilot program developed and operated by The Society for the Retired and Semi-Retired (SRSR) in Edmonton during 1987-1988. The report provides background information on The Society, the research approach, study objectives, literature review, pilot program, and project evaluation.

This section of the report summarizes the study purpose, scope and focus, statement of the problem, terminology and definitions, study approach, and the report structure.

1.1 Purpose of the Study

The purpose of this study was to test the homesharing housing alternative through a pilot project and to recommend on the appropriateness and feasibility of the approach and on the conditions and procedures for implementing it. The detailed objectives were to:

1) investigate the need for a homesharing program,
2) develop a proposal for a homesharing program and for operating procedures,
3) implement a homesharing pilot project,
4) evaluate the pilot project, and
5) develop a manual which would enable interested parties to establish a homesharing program.

1.2 Scope and Focus of the Study

The study explored the concept and management of a homesharing program operated by a non-profit organization. The scope of the study included:

- those seniors who were basically healthy and independent, many of whom resided in their own homes but who wished to share their homes in order to facilitate their extended residency in that environment; and

- those potential sharers who were also basically healthy and independent, but considered shared housing as a viable means of meeting their residential needs.

The work focused on the development, testing, and evaluation of a pilot homesharing project and the subsequent development of a manual on establishing a homesharing program.

1.3 Statement of the Problem

There is a growing interest in developing ways to foster the residential well-being of seniors. This interest includes the extended independent living of seniors in their homes and a broad spectrum of supportive housing for those with limited resources. To achieve these ends, the Province of Alberta administers a broad range of housing, social, and related programs, yet there is an increasing need to find alternative economical approaches to the provision of such housing and support services. One such approach, referred to as ***homesharing***, involves homeproviders offering to share the use of their homes with another person (or persons) in need of housing. This arrangement can provide inexpensive housing for the homeseeker and variable support services for the homeprovider. This study explores that homesharing option.

1.4 Terminology and Definitions

For the purpose of this study, ***homesharing*** is a housing arrangement in which two or more unrelated people pool some of their personal and financial resources in order to share a home. Each resident has his/her own private bedroom and shares common areas such as the living room and kitchen.

The concept of homesharing is also referred to as ***shared accommodation*** or ***shared housing***. However, in cases in which more than four unrelated people share a home, the situation is known as ***group sharing***. For the purposes of this study, homesharing is limited to four sharers, with two people sharing as the most common arrangement.

The ***homeprovider*** agrees to share his/her home -- be it a house, condominium, townhouse, duplex, apartment, or mobile home -- with another person. The ***tenant***, or ***homeseeker***, shares housing costs with the homeprovider and typically exchanges services for rent.

Because the organization sponsoring this program serves older persons, the Homesharing Program requires one of the sharers to be 55 years of age or older. Although it is often the senior who is the homeprovider, this is not always the case. For example, a young family who desires a grandparent figure may opt to share their home with a senior.

1.5 Study Approach

The work was divided into three primary phases. In Phase I, a contract researcher undertook the basic research and developed the operational procedures for the pilot project. In Phase II, The Society for the Retired and Semi-Retired hired a full-time person to implement the pilot program and prepare a volunteer manual. The program was evaluated and documented in Phase III. The project was administered by Hazel Christenson, the Housing Registry Co-ordinator, who also supervised the Homesharing Program.

1.6 Report Structure

Each major section of the report begins with a brief introduction and an explanation of the contents, and ends with a summary. The report includes the following sections:

- Section 2: description of the sponsoring organization,
- Section 3: review of literature,
- Section 4: research, sampling, data collection, and need assessment,
- Section 5: the pilot program,
- Section 6: the evaluation of the program, and
- Section 7: summary and recommendations.

In addition, interview contacts, questionnaires, questionnaire results, and a list of homesharing agencies in Canada are included in the appendices.

2.0 THE SPONSORING ORGANIZATION

2.1 Background of the Sponsoring Organization
2.2 Previous Experience with Homesharing
2.3 Issues and Concerns

2.0 THE SPONSORING ORGANIZATION

The Society for the Retired and Semi-Retired (SRSR) was responsible for administering the homesharing study and pilot project. This section describes the Society and its previous experience with homesharing.

2.1 Background of the Sponsoring Organization

The SRSR, a non-profit organization, was established in 1970 "to serve the older people in the City of Edmonton, their families and the community at large, and to assist aging persons to achieve the highest possible quality of life."

The SRSR operates a Housing Registry which offers an information and referral service to senior citizens regarding public and private housing alternatives. An attempt is made to identify and register all seniors who are actively seeking alternative accommodation. Providing up-to-date information on housing projects for homeowners or renters, as well as government grants and rebates available to the senior population, continue to be services in great demand. During 1986, 9,519 persons contacted the Housing Registry for assistance. From these contacts, new registrations increased from 266 in 1985 to 331 in 1986. The total number of active registrants was 879 as of December, 1986. The Housing Registry provides these services with two full-time staff members and a number of dedicated volunteers. In 1986, these volunteers worked a total of 1,703 hours.

During the past year, SRSR has seen an increase in service in two specific areas:

- assisting the growing number of persons between the ages of 55 to 64 years seeking adequate low-cost housing, and

- counselling the increasing number of older people making a transition from one type of accommodation to another.

In each of these areas, the primary concern is finding adequate accommodation to provide the highest level of independence possible. Referrals to community and social service agencies often assist to this end.

2.2 Previous Experience with Homesharing

Because of a number of requests for live-in companions, in 1983 SRSR initiated a Shared Accommodation Program which was developed by five summer students hired under a Summer Canada Grant.

They determined the need for such a program following discussions with seniors and other agencies serving older people. Subsequently, the students assisted in establishing operational procedures and conducted interviews for homesharing. The students also recruited a team of volunteers to continue the program when the Summer Grant was over.

These volunteers remained involved with the Shared Accommodation Program. In an effort to maintain the program, the Assistant Housing Coordinator continued to be responsible for the program. The resulting workload, however, proved too demanding for both the Assistant Coordinator and the volunteers. The formal program was discontinued in May, 1985. An informal matching service for homesharing evolved and individuals posted a notice on the Housing Registry bulletin board with their telephone numbers so that other sharers could contact them directly. Staff or volunteers checked with participants every three months to see if they were still interested.

Nevertherless, the Shared Accommodation Program was successful -- 14 matches (a high number for a new service) were made between September, 1983 and December, 1985.

2.3 Issues and Concerns

Based on the previous student program, it was apparent that several key areas needed to be addressed if a Shared Accommodation Program was to be re-established; these included:

- a full-time program co-ordinator,
- funding for the Program,
- statistics on the Program,
- volunteers to assist the program co-ordinator,
- advertising and promotions, and
- a suitable demonstration period.

In summary, The SRSR Housing Registry believed there was a need for a homesharing program to serve seniors in Edmonton by providing a housing option which would allow them to remain independent in their own homes for as long as possible. However, the need for, and form of, homesharing must be demonstrated through a feasibility study to ensure its appropriate implementation. This study responds to this need.

3.0 REVIEW OF THE LITERATURE

3.1 The Need for Housing Alternatives
3.2 The Concept of Homesharing
3.3 Homesharing Programs
3.4 Program Planning and Design
3.5 Operational Procedures
3.6 Education and Marketing
3.7 Program Evaluation
3.8 Sponsorship and Funding

3.0 REVIEW OF THE LITERATURE

Because homesharing is a relatively new concept, there is not a proliferation of research studies in this area. However, there are a number of descriptive case studies and articles, often documented by the agencies involved, regarding homesharing programs. This section reviews the literature on homesharing according to the following key topics: the need for housing alternatives, the concept of homesharing, existing programs, program planning, development, operations, marketing, evaluation, and sponsorship and funding. It includes literature which was available in 1987.

3.1 The Need for Housing Alternatives

3.1.1 Demographics

Canadian demographics are rapidly changing. There are now about 2.5 million Canadians over the age of 65, representing 9.5 percent of the population. This figure will climb to six million -- 22 percent of the population -- by 2030 (Goldblatt et al, 1986). In Edmonton, there are currently about 47,000 people 65 and over and 92,000 in the 55 and over category. The number of seniors over 65 is projected to be about 80,000 by 2001 -- only 13 years away. As the baby boomers enter the senior segment, the projections rise dramatically.

A rapid increase in an aging population presents many social issues such as increasing demands and costs for services. Housing is one area of such concern.

3.1.2 Living Arrangements of Seniors

About 90 percent of Canadian seniors over 65 live in private households of one or two people. Twenty-five percent of Alberta's elderly live alone. However, the number of people living alone is increasing. Because women live longer on average, more women (single and widowed) than men tend to live alone in private households or reside in collective arrangements.

Two-thirds of seniors own their own homes, although the percentage decreases with age. Sixty percent of seniors live in single detached homes, 12 percent in apartment buildings, and the remainder in other forms of multiple dwellings and mobile homes (Brink, 1984b).

Most elderly renters live in one or two bedroom units. In contrast, most elderly homeowners live in two or three bedroom homes. "If the traditional index of one person per bedroom is followed, one half of the elderly homeowners may be considered to be over-housed" (Brink, 1984b, p. 5).

3.1.3 Housing Alternatives for Seniors

The range of housing alternatives for seniors may be clustered into three major categories:

- independent living alternatives (87.5% of seniors),
- supported independent living (5.9% of seniors), and
- dependent living alternatives (6.9%).

The principal goal of reducing the institutionalization of seniors has led to a number of innovative housing solutions for seniors in the first two categories. These alternatives include the granny flat/garden suite, congregate housing, accessory apartments, shared housing, retirement villages, health care communities, cooperatives, and home equity conversion. The challenge for Canada will be to supply appropriate and affordable housing both now and in the future (Brink, 1984b; Goldblatt et al, 1986). Today, living arrangements are seen in terms of small-scale alternatives, not large expensive solutions (Goldblatt et al, 1986).

The vast majority of seniors live in their own homes and do not wish to be "warehoused" (The Edmonton Journal, August 26, 1987, p. A6). They want to choose where to live. Because future seniors will be better educated, better informed, and have more diverse experience, they will demand more in terms of housing and support services than the current population of elderly. However, today's elderly are often faced with increasing difficulties associated with home ownership such as loneliness after the death of a spouse, maintenance, and rising costs. Homesharing is an option suitable to such independent seniors who may also require some level of support (Brink, 1984b). Less than 7 percent of the senior population are unlikely candidates for homesharing.

But, housing choices are constrained by income. In 1981, half of the families headed by persons 65 and over had incomes under $15,000. "Elderly unattached individuals are very heavily concentrated in the lower income groups, particularly single women. Over half (57%) of such elderly individuals had incomes below $7,000 in 1981" (Brink, 1984b, p.6). Home equity is the primary element of net worth of senior homeowners. Because homesharing is one way lower income senior homeowners may remain in their own homes, it should be promoted to this group.

3.2 The Concept of Homesharing

3.2.1 Background

Homesharing is a new term for an old idea of taking boarders into a private home to supplement household income. Today, homesharing has taken on new significance because so many people over 65 are living alone in their own homes. Many want to share for companionship, not for profit. A shortage of affordable rental accommodation, however, is an incentive for others to share with homeowners (Goldblatt et al, 1986).

Homesharing is a home-like solution for people who want companionship and some assistance with activities of daily living. Most older people who need such assistance prefer to meet this need with as much independence and privacy as possible. It is an option which falls between independent living and a nursing home.

3.2.2 Advantages and Disadvantages of Homesharing

The benefits of homesharing include:

- coping with loneliness,
- saving money through shared costs,

- having a greater sense of security,
- avoiding the stigma of institutionalization,
- maintaining the helping role,
- providing an alternative to living with children, and
- maintaining normal neighborhood living and freedom of activities.

The drawbacks of homesharing are:

- the partial loss of privacy and independence,
- the necessity for accepting some responsibility for the more handicapped in the setting,
- risk-taking regarding homesharers, and
- the acceptance of change (Ehrlich, 1986).

For communities, homesharing is an important strategy which addresses the problem of displacement. Homesharing enables older people to "age in place" and remain in familar surroundings. Housing costs and social isolation are reduced and emotional and physical supports are increased. Further, homesharing increases efficient use of existing housing stock, helps to alleviate the shortage of reasonably priced housing, and can be important to neighborhood or property stabilization. Homesharing also reduces the demand for costly institutional support (Dobkin, 1983).

3.2.3 Interest and Demand for Homesharing

There has been limited study in the area of interest in homesharing. One American survey (Turner and Mangum, 1984) reports that 6 percent of homeowners and 10 percent of renters were interested in homesharing. However, recently there has been an increased awareness and understanding of homesharing. The American Association of Retired Persons conducted a national survey of 1,500 adults 60 years of age and over. Fifteen percent indicated they would consider shared housing (Dobkin, 1987).

The interest and demand for homesharing in Canada has not been well researched, but several studies are currently underway. In a study of

Edmonton seniors who had considered a retirement villlage, 6 percent indicated they had also considered homesharing (Romank, 1987) .

In a recent survey of American homesharing agencies, the typical applicant is someone who is experiencing some life transition that makes living alone at home a problem, but who is reluctant to share. Often, people do not apply for homesharing until they are unable to manage alone at home (Jaffe and Howe, 1988).

3.2.4 Constraints to Homesharing

There are three major deterrents or constraints to homesharing which could inhibit the viability of a homesharing program. According to McConnell and Usher (1980), these issues include:

- zoning restrictions or laws,
- tax implications of "rent", and
- consumer attitudes to "doubling-up".

3.3 Homesharing Programs

The National Shared Housing Resource Center, Inc. (SHRC) was established in 1981 in Philadelphia to assist in increasing the availability of shared housing programs throughout the United States. The SHRC offers a variety of shared housing services including technical assistance, resource development, and training to both public and private agencies. They serve both match-up and group sharing programs and are a clearinghouse for information on homesharing. Although there is no national group in Canada like the SHRC in Philadelphia, the Vancouver Homesharers Society networks with the homesharing programs across Canada and the U.S. and relays the information through a homesharing newsletter.

There are currently over 400 homesharing programs in the United States -- about 200 match-up and 200 group sharing programs -- up from 12 in 1975. However, most programs are fairly new with an average age of four years.

Nearly 80 percent of the match-up programs are intergenerational with over half requiring at least one homesharer to be a senior.

Homesharing programs in Canada tend to be viewed as housing services, whereas in the U.S. they are generally viewed as social services. Nevertheless, there is an overlap between these two types of services, and funding is often provided from both sides (Corke, 1987).

In Canada, homesharing programs are also relatively new -- most were established in 1983 or 1984. There are currently about 14 homesharing programs serving seniors across Canada (see Appendix C). Because it is a form of housing not likely to produce a high return for private investors, it is likely sponsored by a non-profit group (Goldblatt, 1986).

An overview of agencies across Canada for which information was available is provided in the following pages.

3.3.1 Vancouver Homesharers Society

Established: As a non-profit society in 1983.

Purpose: To locate Vancouver senior citizen homeowners (or apartment renters who can accommodate one or two extra people) who would share their homes with compatible people in exchange for companionship, home help, expense sharing, or whatever arrangements are mutually acceptable.

Program Type: Intergenerational (one person must be a senior); modelled after the Seattle program; a counselling, agency-assisted model.

Staffing: 2 paid staff members, board of directors, volunteers.

Procedures: Home interviews, telephone screening, advisory services, referrals, and counselling.

Marketing: Most homesharers hear about VHS through friends, local newspapers, or professional referrals.

Homesharer Profiles: Typical homeowner is an elderly female (75-85), most likely widowed, "overhoused", in a single-family residence predating 1945. The typical homesharer is considerably younger and is working or studying.

Reasons for Sharing: Security, isolation, loneliness.

Matches: 11 in 1983; 50 in 1984; 39 in 1985; 44 in 1986; goal of 50 matches for 1987.

Funding: Originally by New Horizons; currently through grants, memberships ($2 fee) and donations (including an optional $50 donation upon a satisfactory match). Budget for 1987 is $65,000.

Other: Monthly share meetings for applicants (average attendance 16) (2 resulting matches). Recently sent questionnaires to homesharers to evaluate the program. In past has had more seekers than homeproviders.

3.3.2 Match and Share, Ottawa-Carleton

Established:	1984 as a non-profit organization.
Purpose:	To match senior homeowners and apartment dwellers with people interested in a homesharing arrangement.
Program Type:	Intergenerational (one person must be 55 or older).
Staffing:	2 full-time, 1 part-time public awareness officer, volunteers.
Procedures:	Interviews, screening, match, and follow-up.
Marketing:	A "hot line", mall display stand, homesharing buttons, bus ads, media interviews/ads/articles, presentations.
Homesharer Profiles:	75% seniors, 66% female; homeproviders: 88% seniors, 77% female; homesharer: 52% seniors, 58% female; 61% intergenerational matches.
Reasons for Sharing:	Financial, loneliness, companionship, home help, affordable housing, home babysitting, older role model.
Matches:	As of December 1986: 1200 inquiries; October 1984 - December 1986: 81 matches involving about 200 people; 1985-86: 422 inquiries, 250 interviews.
Funding:	Regional Municipality of Ottawa-Carleton. Originally Ontario Ministry of Housing and the Regional District.
Other:	In process of computerizing.

3.3.3 Sharing, Toronto

Established:	In 1984 as a non-profit organization.
Purpose:	A match-up service to assist older, unattached persons to find suitable partners with whom to share accommodation.
Program Type:	Intergenerational (1 party in each match must be 55 or older); three pronged approach -- seeker-provider matches, seeker-seeker matches, and co-op households (not yet achieved).
Staffing:	Board of directors, 3 part-time staff, more than 12 volunteers.
Procedures:	Interviews, introductions, match, follow-up, and counselling.
Marketing:	Radio announcements, TV and newspaper interviews, feature articles, mailings brochures and bookmarks to libraries, paid ads, displays, participation in special events. Extensive referral network.
Homesharer Profiles:	More homeseekers than homeproviders. Of registrants, 80% are female, 40% are retired and 51% (70% of matches) are between 55 and 65.
Reasons for Sharing:	Affordable housing, mutual support, companionship, and security.
Matches:	32 matches in 1987 to September 30 (goal of 3/month).
Funding:	Initially funded by New Horizons' now by Ontario Ministry of Housing and Metropolitan Toronto Community Services. $5 fee and $20 balance upon match. Budget for 1987 is about $44,000.
Other:	Planning ads in subway and buses in 1988.

3.3.4 Project Coexistence, Montreal

Established: 1983 within Catholic Community Services.

Purpose: To help the elderly remain independent as long as possible by finding someone to live with them who can repond to their needs, be they physical, financial or emotional.

Program Type: Intergenerational (1 usually a senior) Operates in French and English.

Staff: One-third staff person, student interns, a few volunteers.

Procedures: Interviews, reference checks on suspicious, introductions, match, counselling.

Marketing: Community outreach when staff is available.

Homesharing Profile: 75% are homeproviders,mostly elderly females seeking other females.

Reasons for Homesharing: Isolation, loneliness, basic service needs, financial.

Matches: 107 in 3 years. 15 active, waiting list of 211 (176 homeproviders, 35 homeseekers). Average 163 inquiries and 3 matches per month.

Funding: A serious problem with no funding in sight. Student internship grants and Federal Government job creation grants. Budget for 1986 was $7,635.

Other: Computerizing. Noticing an increase in handicap applications. Studying use of volunteers to do home interviewing and assessment.

3.3.5 Dartmouth S.H.A.R.E.

Established: 1983 through the Senior Citizens Service Centre in conjunction with the Community Services Division of Dartmouth Social Services.

Purpose: To help locate shared housing opportunities for older people as an alternative to living alone, in institutions, or in subsidized housing.

Program Type: Intergenerational (1 person must be 55 or older).

Staffing: 1 full-time.

Procedures: Intakes, interviews, introductions, match, counselling, and follow-up.

Marketing: Newpaper spots, bus ads, ads in local flyers, brochures.

Homesharing Profile: 65% homeowners, 35% homeseekers (in 1984). Now have an abundance of homeseekers.

Reasons for Sharing: Reduced expenses, home sitting, home help, loneliness.

Matches: Between July 1983 and November 1984: 550 inquiries, 274 intakes, 124 interviews, 19 matches.

Funding: A free service. City grant.

3.3.6 Homesharing for Seniors, Seattle

Established: 1979 as a non-profit program.

Purpose: Homesharing for Seniors serves elderly householders, tenants, and/or handicapped persons who need to alleviate housing problems and maintain security in independent living by sharing a home.

Staffing: 3-4 full-time staff, no volunteers.

Procedures: Intakes, interviews, screening, referrals, match, follow-up.

Marketing: Brochures, local media, personal contact, bank newsletters.

Homesharer Profile: 62% female, 68% over 55, 88% low-income.

Reasons for Sharing: Security, companionship, financial.

Matches: Cumulative statistics as of October 1986: 8000 inquiries, 2780 intakes, 4213 referrals, 1676 placements.*

Funding: A United Way Agency under the umbrella of Senior Services of Seattle. Funded as a public and housing service by community development block grants.

Other: Vancouver and Dartmouth programs modelled after this program. Recently streamlined their intake and interview forms to deal with more applicants. Also put onus on clients to check references. May be computerizing in near future.

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* More than 40% of Seattle's elderly live alone and are below the poverty line.

3.3.7 Project Match Inc., San Jose, California

Established: In 1981 as a private non-profit agency.

Purpose: To arrange shared housing for seniors and other adult residents of Santa Clara County.

Program Type: Intergenerational (1 person a senior).

Staffing: 4.5 people plus one volunteer.

Procedures: Interviews, introductions, match, follow-up and counselling.

Marketing: Information to community and government agencies, ads through local media, and feature articles.

Homesharing Profile: One-third intergenerational, 58% senior peer matches.

Reasons for Sharing: Financial, home help, companionship.

Matches: Matched 400 seniors in first 1.5 years.
In 1982: 1049 people (goal of 694).*

Funding: A free service. Various funding through county, city and state grants, donations.

---

* Homesharing Programs in the United States have significantly more matches than Canadian ones for the following reasons: a) American programs have generally been established longer, b) there is increased public awareness and understanding of the concept in the U.S., c) there tends to be more emphasis on serving the homeless, college students, and single parents in the U.S., d) high housing and heating costs, and e) gentrification of inner city buildings in American cities which house many elderly people.

3.3.8 Match Duration and Reasons for Break-up

Most homesharing matches are fairly short-lived. A recent American study noted that between 30 and 90 percent of matches end within the first three months because of incompatibility. Although successful matches rarely last more than one year (Jaffe and Howe, 1988), Schreter and Turner (1986) found the median duration of matches was six months. A study of matches in Niagara also found that the majority (65%) lasted up to six months (Rapelje, 1984).

Homesharers, particularly homeseekers, expected the match to last less than one year. Homesharers are often people facing changing life circumstances. Therefore people with complementary resources and needs can provide each other a sense of balance during these times (Schreter, 1986). In fact, many matches are established initially as temporary or short-term arrangements (McConnell & Usher, 1980).

The major reasons for match dissolution are mismatched expectations, incompatibility, and life changes (Blackie, 1985; Project Match Inc., San Jose). Other reasons for match break-up include:

- moved into independent living,
- moved closer to family,
- remarriage,
- provider assumed increased family responsibility,
- change in health status,
- financial changes,
- requirement for higher level of care, and
- death (Rapelje, 1984).

3.4 Program Planning and Design

3.4.1 Homesharing Models

There are essentially two types of agency assisted homesharing: agency-sponsored (agency supported group homes) and agency-assisted (a homesharer matching service), which is the focus of this study .

The agency-assisted matching service initially developed as a clearinghouse which provided applicants the convenience of having a third party do reference checks and make referrals or introductions. This model is designed to operate exclusively as a homesharer referral service. Once the referral is made, there is little or no contact maintained. Recently there has evolved an alternate counselling model which provides a larger scope of services including intake/screening, reference checking, counselling, community information and education, agency referrals, in-depth interviews, home assessments, introductions, assistance with agreements, and follow-ups.

Match-up programs provide homeproviders and homeseekers with various homesharing arrangements from peer homesharing (seniors with seniors) to intergenerational homesharing (younger people with seniors). These matches can be based on rent for room and board or may involve barter homesharing (an exchange of services for rent).

3.4.2 Target Groups

"There are many who could benefit from a homesharing program: the elderly, one-parent families, the divorced or widowed, students, single persons living alone, families unable to afford home ownership, the mentally or physically disabled" (Dobkin, 1983, p. 5).

3.4.3 Candidate Criteria

Establishing candidate criteria for the program at the outset helps to define exactly which group(s) you wish to assist. It will also be an important tool for screening suitable homesharing candidates rather than falling into the tendency to help everyone. For example, will your program assist crisis homesharers (i.e., those that have an emergency need)?

There are objective and subjective candidate selection criteria. Objective criteria can be assessed over the telephone during the initial contact, while subjective criteria require that there be more involvement and interaction with skilled staff.

Objective criteria include:

• Age.	The majority of match-up programs serving older adults offer intergenerational and peer arrangements.
• Income.	Some match-up programs have income restrictions because they are obligated by their funders to serve only limited income people.
• Rent.	Match-up programs commonly encourage reasonably priced rent, particularly programs geared to low income people.
• Housing offered.	Match-up programs usually accept homeproviders who live in single family dwellings, duplexes, and apartments. Studio and one-bedroom units are not suitable.
• Area served.	Successful programs usually serve sections of a large city, an entire city, or a county.
• Time commitments.	Time commitment requirements depend on the type of candidates the program serves (eg., emergency versus longer term, or both).
• Secondary housing arrangements.	Homeseekers are encouraged not to give up their housing until after a successful trial period to ensure a suitable match.
• Self-referral.	Although relatives may inquire for the homesharer, contact with the potential sharer is recommended to ensure their interest.
• Health status.	Programs tend to serve independent and semi-independent people who are ambulatory, self-medicating, continent, and able to handle personal care needs.

Subjective criteria refer to such factors as emotional stability -- for example, the person can follow conversation, shows good judgement and problem solving capabilities, and is willing to compromise and be flexible (Dobkin, 1983).

3.5 Operational Procedures

A match-up program works through several steps:

• Initial contact.	During telephone contact, inquirers are provided with information about the program. The staff person and inquirer mutually determine if homesharing is realistic and whether basic selection criteria are met.
• Intake.	If the person is a suitable candidate and wishes to proceed, an intake form which collects basic information is completed and an interview time set.
• Interview.	Personal interviews are conducted with potential sharers to determine the applicant's needs, expectations, preferences, and concerns.
• Housemate search.	Potential sharers are matched on such factors as preferences, interests, hobbies, background, and personality.
• Housemate referral.	Potentially suitable sharers are informed about each other and asked if they wish to be introduced.
• Introductions.	A staff person introduces potential sharers and addresses questions or concerns.
• Trial period.	If the introduction is successful, a trial arrangement is suggested to ensure a suitable match.
• Match.	A lease agreement is signed by both sharers.
• Follow-up.	Staff periodically contact the sharers to determine the success of the match and to assist with unresolved problems.

Records should be kept of homeowners and homeseekers for program statistics and to note imbalances between the two groups.

3.5.1 Staffing and Volunteers

People trained in social service work are preferable employees and volunteers, but commitment to homesharing is the most important requirement . The program should have one full-time employee who has the reponsibility of coordinating and supervising the implementation of the program. However, the role of the counsellor is most important and should not be underestimated. "Qualified" workers in the program should be able to demonstrate:

- knowledge of the problems older people face,
- familiarity with current services and resources available to older people,
- skills in phone intake, interviewing, and counselling,
- ability to maintain records and files,
- ability to relate to people, and
- skill in written and oral communication.

3.6 Education and Marketing

Consumer education is the key in developing match-up program demand. Homesharing is a relatively new concept for today's seniors and as such, it is perceived as "doubling-up" - an act of necessity associated with pre- and post-war situations. Seniors do not readily become sharers. To be successful, homesharing must be promoted and supported through agencies which provide safe introductions and follow-up counselling.

An extensive promotional strategy is most important during the first six months of the program, but continuous publicity is necessary throughout the life of the program (McConnell & Usher, 1980).

Specific strategies include feature articles in newspapers and magazines, radio and television announcements, posters, information packages to community groups, and exhibits.

3.7 Program Evaluation

3.7.1 Program Success

According to Baldwin (1986), match success and longevity appear to be influenced by four factors:

- the degree of compatiblity between the homeprovider and homesharer,
- the degree of pre-match counselling and "instruction" received about homesharing,
- the post-match counselling, monitoring, and support offered by the homesharing service after the match, and
- the willingness for the match to work as expressed by both parties.

Program success, on the other hand, can be measured using the following basic units of service:

- number of inquiries,
- number of interviews,
- number of referrals,
- number of matches,
- number of successful matches,
- number of matched clients,
- counselling provided,
- information provided on community services, education and referrals,
- follow-ups (Dobkin, 1983).

3.7.2 Cost

The average cost per person placed in a match in the U.S. ranges from $100 to $500 depending upon the nature and quality of homesharing services provided. The average cost of four homesharing programs in Ontario was $310 per person matched (Spence, 1987). With a goal of three matches per month and a budget of $30,000 per year, Sharing in Toronto matches people for approximately $400 per sharer. Dartmouth Share's cost is between $400 and $500 per sharer.

Program cost-benefit may be evaluated by examining cost of per person day of accommodation, match duration, and success in meeting match expectations. The bottom line for analyzing cost is to evaluate the cost of meeting clients' needs successfully (Dobkin, 1983).

3.8 Sponsorship and Funding

"The majority of Homesharing agencies in existence in Canada were initially funded by seed money under the New Horizons Program. The limitation of this Program is that funding continues only for two consecutive years. Thus, many of the agencies need to spend considerable time and energy searching for alternative long term funding subsequent to the New Horizons grant.

Canadian homesharing programs tend to be funded through various levels of government and include: Canada Works Program, Employment Canada, Canada Mortgage and Housing Corporation, municipalities, regional districts, and provincial departments (Baldwin, 1986).

Two key components in developing a homesharing program are a capable sponsor and adequate funding (Milone, 1986). The initial funding period should be for at least one full calendar year; previous projects have found that any funding period less than one year is too short to initiate a house-sharing service. Although funding for agencies across Canada varies from $15,000 to $90,000 per year depending on the affiliation of the agency, the most common budget is between $30,000 and $40,000 per year (Baldwin, 1986).

In summary, there is a need for housing options to fill the gap between independent living and institutional care. Homesharing is a program which allows seniors to remain independent and self-sufficient through a self-help approach. Homesharing also allows seniors to remain in their own homes over a longer period of time. Such programs are growing in popularity as consumers become more aware of the benefits of this type of living arrangement and as more of these programs are offered in their communities.

4.0 NEED ASSESSMENT

4.1 The Senior Population
4.2 Living Arrangements of Seniors
4.3 Existing Support Services
4.3 Selecting the Type of Homesharing Program
4.4 Assessing Community Needs
4.5 Interest in Homesharing by Edmonton Residents

4.0 NEED ASSESSMENT

The need for a Homesharing Program in Edmonton was determined through four major sources: through provincial and civic research publications (listed in the bibliography), interviews with individuals working in the field of seniors housing and support services, questionnaires completed by seniors, and interviews with potential homesharers. This section provides background information on seniors in Alberta and summarizes the preliminary need assessment for a homesharing program as an alternative form of housing available to seniors and other adults.

4.1 The Senior Population

As mentioned in Section 3, the population over 65 years of age is growing very rapidly. There has been nearly a 30 percent increase in the number of seniors from 1981 to 1986. In 1987 there were 46,900 people over 65 in Edmonton (Alberta Bureau of Statistics). By 2001 it is expected that this number will climb to about 80,000.

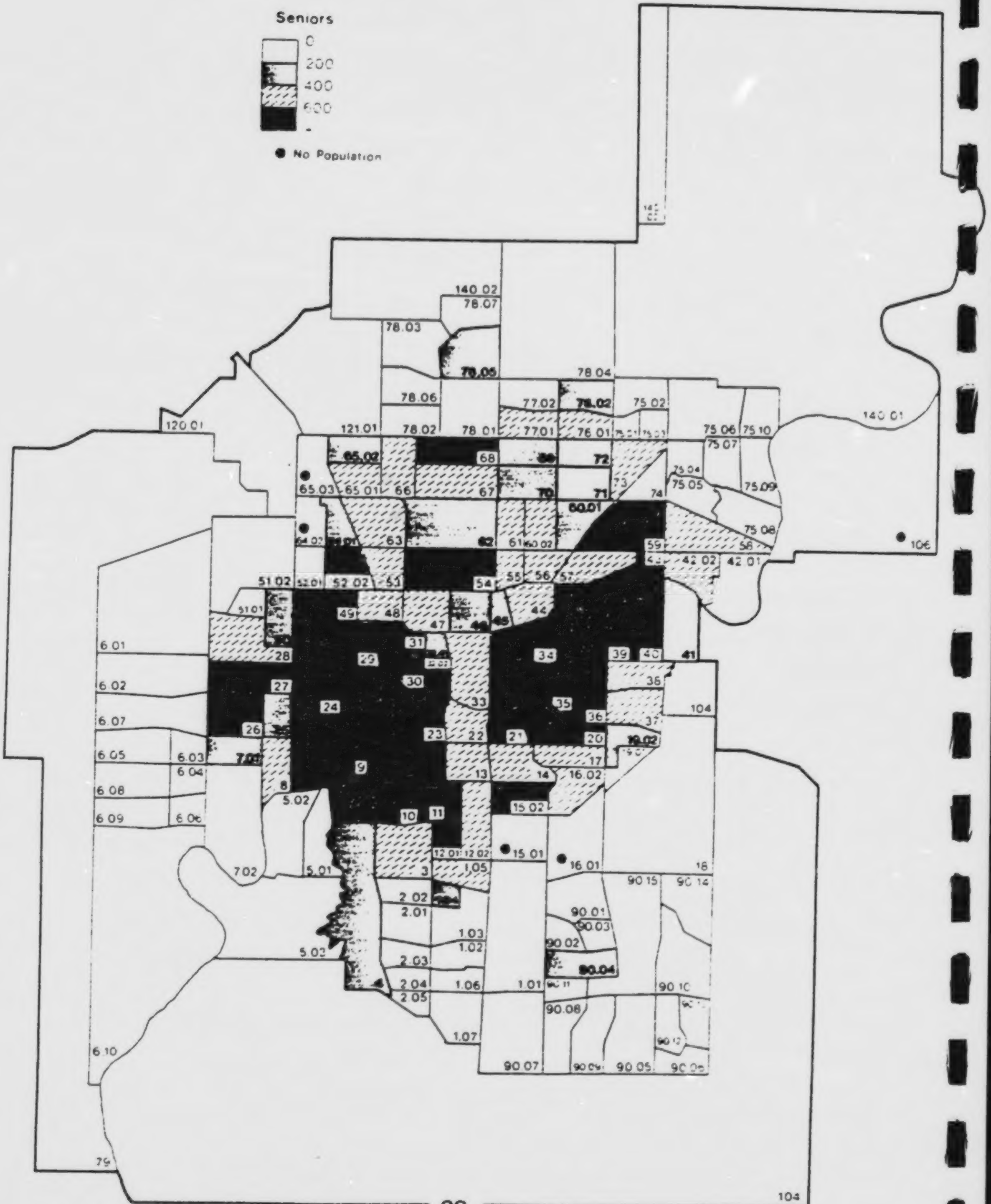
Although older people live in all areas of Edmonton, the greatest concentrations live in older areas of the city and have resided there for many years. The highest concentrations of seniors are presented in Figure 4.1 on page 32.

There are only about three-quarters as many men as there are women (17,647 men and 24,187 women) which suggests that programs and services be targeted to the higher proportion of older women.

More than half the senior population is married, over one-third is widowed, and the remainder are single or divorced. Widowed women outnumber widowed men by a ratio of 4:1 --10,030 women to 2,505 men.

The adequacy of income and income support programs for senior citizens in Edmonton has improved over the past two decades. Based on the National Council of Welfare figures, the poverty line in 1986 was $10,647.52 for a single person and $14,048.32 for a couple. Based on Old Age Security, the Guaranteed Income Supplement, and the Alberta Assured Income Plan, the

Figure 4.1 Number of Seniors (65 years and over) in Edmonton by Census Tract


Seniors
0
200
400
600
-
● No Population
140.02
78.07
78.03
78.05
78.04
78.06
77.02
78.02
75.02
121.01
78.01
77.01
76.01
75.06
75.10
75.07
140.01
120.01
65.02
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39
40
41
38
6.02
27
30
33
35
24
104
6.07
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37
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19.02
6.05
6.03
7.01
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16.02
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6.09
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90.15
90.14
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1.02
90.02
5.03
2.03
90.04
2.04
1.06
1.01
90.11
90.10
2.05
90.08
1.07
90.12
6.10
90.07
90.09
90.05
90.06
79
104

Source: Civic Census (1987)

minimum income for a single person in Alberta is $8,712.24 (18% below the poverty line figure). For a couple, the minimum income is $14,556.48 (4% above the poverty line). Incomes for single pensioners, generally female, remain well below the poverty line.

4.2 Living Arrangements of Seniors

Eighty-eight percent of seniors in Alberta live in their own homes or apartments and not in lodges, nursing homes, or "senior citizen homes" as is often assumed. In fact, 68 percent of independent Edmontonians over 65 live in dwellings they own, while 19 percent live in private rental accommodation, and 12 percent live in subsidized rental accommodation.

However, one in four seniors in Edmonton lives alone. Because significantly more women over 65 live alone (31%) than men (14%), women may feel more at risk.

4.3 Existing Support Services

Although increasing age brings increased incidence of minor disabilites, the majority of older people are not severely limited by health conditions. Studies show that the majority of Alberta seniors are (for the most part) able to care for themselves.

A study by Strategics (1983) surveyed seniors about their use of support services such as *Meals on Wheels*, *Home Nursing Care*, and the *Home Help Program*). A relatively low percentage of seniors over 65 who lived in private accommodation used such services. Users of support services tended to be seniors who were in renter assisted programs. Nevertheless, the current demand for home care services is greater than the supply, suggesting that additional home care services are required.

However, Alberta Social Services estimates that 15 to 20 percent of the elderly in Alberta may be in need of help on a continual or intermittent basis. This group of seniors may be interested in homesharing combined with other support services as a means of remaining in their own homes rather than entering institutions or government subsidized housing.

4.4 Selecting the Type of Homesharing Program

Developing a homesharing program requires an examination of the community context within which the program will operate to assess the needs of residents within that community. A community with a large population of relatively independent seniors who need only reasonably priced housing would take a different focus than a community of more physically and psychologically dependent seniors. For the independent senior, the homesharing program may simply be a housing referral service with no additional support services. Where more extensive needs arise, the program may offer more appropriate services or make referrals.

4.5 Assessing Community Needs

The assessment of community needs for seniors' housing and support services was completed through personal and telephone interviews with various social service, housing, health, and senior citizen agencies (a list is provided in Appendix A).

Because of the diversity of agencies, the interviews were informal and unstructured in nature. In general, however, the following key topics were discussed:

- the agency's perceived need for a homesharing program,
- demand for support services,
- the existing housing situation,
- the agency's overall interest in the homesharing concept, and
- the anticipated benefits and problems associated with such a program.

The vast majority of agencies overwhelmingly expressed a need for such a program and were very positive about the concept. However, the following reservations were expressed:

- the number of participating seniors would likely be small because of the independent and individualistic nature of our society, and
- it might be difficult to match seniors with seniors because of the problems associated with combining two households and all their possessions.

Although most agencies were unable to estimate the demand for homesharing, Edmonton Social Services has been approached by several seniors each year who were looking for someone willing to share their homes. The Westmount Branch estimated that one in ten of their clients would be willing to homeshare, particularly seniors who live near The Northern Alberta Institute of Technology (NAIT) and could accommodate students.

In general, the agencies' responses toward homesharing, as another housing alternative to keep seniors independent and in their own homes, were positive. However, it was recognized that it is an option that is not suitable for all people, but one that may appeal to those in need of social interaction, support in maintaining their homes, or financial assistance.

4.6 Interest in Homesharing by Edmonton Residents

A questionnaire on homesharing was printed in *News for Seniors*, a newspaper produced by The Society for the Retired and Semi-Retired, in the initial month of the pilot program. Forty-nine questionnaires were completed and returned (see Appendix B).

Most (81%) of the respondents were female, nearly half of whom were widowed. The majority of respondents were between 65 and 75 years of age, and the majority (59%) lived in a single family dwelling. These results typify target groups in other homesharing programs; senior homeproviders are typically older women who live alone.

The main reasons for respondent interest in homesharing included:

- companionship,
- security/safety, and
- affordability/financial sharing,
- assistance with household duties.

Although many respondents were not previously familiar with the option of homesharing, two out of three respondents thought homesharing would be a desirable option for older people in Edmonton. Eighty percent felt there were more advantages than disadvantages to homesharing. If the need arose, one in three respondents indicated they would be very interested in homesharing if it allowed them to remain in their own home. Respondent interest is higher than the typical 6 to 10 percent cited in the literature. This may be attributed to the type of respondent completing the questionnaire (i.e., mainly those who are interested in homesharing).

It should be noted that the limited scale of the project precluded a random sampling of potential homesharers which consequently limits the data analysis to basic summary statistics for the Homesharing Program. The results of this survey are not statistically representative of other areas in Alberta. However, the Edmonton Homesharing Program is comparable in many respects to other homesharing programs in Canada and the United States. Therefore, the program design and procedures resulting from this study, with refinements, may be used as the basis for other new homesharing programs in the Province.

Finally, and perhaps most importantly, potential homesharers who approached the SRSR Housing Registry about the Homesharing Program were interviewed extensively about their background, expectations, reasons for sharing, and preferences for a homesharing match. Structured interviews with seniors were summarized, and results are discussed in the following sections.

In summary, results of the survey and interviews suggest there is a need for a Homesharing Program in Edmonton. Various government and non-profit agencies responded very favorably toward the concept of homesharing for a small segment of the senior population, particularly for those seniors who, for some reason, might not wish to live alone but do wish to remain in their own homes. Although there is an extensive array of support services for the elderly living in Edmonton, this system is currently overburdened. The Homesharing Program would provide another service to the elderly which may lighten the load on support services.

5.0 PILOT PROGRAM

5.1 Program Goals
5.2 Program Design
5.3 Operational Procedures
5.4 Education and Marketing

5.0 PILOT PROGRAM

The Edmonton Homesharing Pilot Program was conducted over a twelve month period beginning September 15, 1987. This section provides an overview of the program goals, program planning and design, operational procedures, and education and marketing of the pilot Homesharing Program.

It is acknowledged that the pilot program was based primarily on the homesharing model developed by the National Shared Housing Resource Center (SHRC) in Philadelphia. The SHRC was founded in 1981 to assist in increasing the availablility of shared housing programs throughout the United States and has become a valuable resource for organizations who wish to develop a homesharing program.

5.1 Program Goals

The following goals were established for the Edmonton Homesharing Program:

1) To increase the number and variety of housing options available to seniors.
2) To provide a housing option which offers privacy and independence, but which also meets the socio-psychological needs of seniors.
3) To provide affordable accommodation alternatives for low income seniors (particularly women) and less advantaged people.
4) To treat older people as individuals with varying needs and housing requirements rather than as a homogeneous group.
5) To train and involve senior volunteers to assist with the program.
6) To minimize premature institutionalization by allowing seniors to remain in their own homes as long as possible.
7) To ease the demand on community services by enhancing seniors' self-help programs.

5.2 Program Design

Before the Edmonton Homesharing Program procedures could be designed, the target market, eligibility of applicants, type of program, and constraints to homesharing needed to be addressed.

5.2.1 Target Market

It should be noted that althougth the program initially focused on ***peer*** matches, the program developed into an ***Intergenerational*** one because of community need. Both peer and intergenerational matches have been made. Although the Edmonton Homesharing Pilot Program is continuing and now focuses on intergenerational homesharing, the program requires one of the homesharers to be 55 years or older. This person is typically the homeprovider.

The primary target markets for the pilot Homesharing Pilot Program were:

- senior homeowners or apartment dwellers 55 years or older who may wish to share their homes because of loneliness, financial reasons, or who are having difficulty coping with household responsibilities;
- adults, typically between 45 and 65, in need of affordable housing often due to life crises such as separation, divorce, or job loss;
- students or younger adults who want affordable housing in exchange for services and who enjoy the companionship of an older person; and
- young families who wish to share their home with a grandparent figure.

5.2.2 Homesharing Eligibility Criteria

Eligibility criteria for suitable homesharing candidates were set according to the program goals and the target markets most in need of such a service. It should be noted that the program is flexible, and as such uses the criteria only as a basic guideline.

Objective eligibility criteria included:

- **Age**: one person in the match must be 55 or older.
- **Income**: no income limits are set.
- **Rent** : reasonable rent, commonly less than private market values.
- **Housing offered**: at least a two-bedroom unit (may be a house, duplex, condominium, townhouse, apartment, or mobile home).

- **Area served**: The City of Edmonton.
- **Trial Period**: a trial period is suggested in which both parties maintain their current housing situation until they are sure the match is suitable.
- **Interview requirement**: referrals may be made by relatives or others, but the applicant must be interviewed.
- **Time commitment :** the applicant should be willing to share for at least six months.

Subjective eligibility criteria included:

- **Health status**: homesharers should be self-sufficient (i.e., be able to handle basic activities of daily living, be ambulatory, continent, self-medicating, emotionally stable, and not dependent on alcohol or drugs).
- **Congeniality**: the applicant should be suited to shared living (eg., able to compromise, solve disputes, provide companionship).

Although the program is flexible, applicants who do not meet most of the above criteria are referred to other agencies or organizations which may be better able to meet their requirements and needs.

5.2.3 Program Model

The model selected for the pilot Homesharing Program was the agency-assisted or counselling model. This model was selected because it provides a larger scope of services than other homesharing models and, as such, is more likely to produce satisfying and compatible matches; a full-time staff person is available to implement the program over the pilot period; it is suitable for the target groups; and it satisfies the desire to reduce the requirement for support services from other agencies.

5.2.4 Constraints to Homesharing

There were three possible impediments to homesharing. The City of Edmonton By-Law Office was consulted to ascertain if city zoning by-laws would prohibit the introduction of homesharing. Although it is difficult to generalize for all areas of Edmonton, the older, established areas (often 15 to 20 years old) are zoned to allow development of self-contained suites. Newer areas are not zoned for suites. It is a problem to develop suites today, even in older zoned areas, because of requirements in meeting building and fire codes.

Renting one or two rooms in a house is acceptable and encouraged according to the City By-Law Office. However, renting three or more rooms presents problems associated with operating a business. Since this represents a level of operation beyond that comtemplated by this project, it does not represent an impediment to homesharing as presented in this report.

A second deterrent to homesharing was the concern about added income from homesharing rental charges. According to Revenue Canada, there is no tax effect on the homeprovider. The position is the same as if the homeseeker was living with a relative or friend on a shared-cost basis. Nor would the homeseeker be regarded as an employee of the homeprovider in performing services around the home. The Society for the Retired and Semi-Retired would not be considered in the business of a rental agency and therefore would not be in a taxable position either.

However, the Edmonton Homesharing Program suggests that both parties complete a Homesharing Agreement (provided in the Homesharing Manual) which is based on the shared-cost premise . Accordingly, there is no income tax effect to the homeprovider and no rental income to be declared on the annual personal tax return. A "Standard Subsection 45(2) Election To Be Made By The Homeprovider" form may be submitted to Revenue Canada to protect the homeowner from possible capital gains arising from using part of a residence for business purposes (this form is included in the Homesharing Manual, Appendix A).

The third deterrent to the Edmonton Homesharing Program was landlord/tenant concerns. According to The City of Edmonton Landlord and Tenant Advisory Board, because homesharing does not fall under the Landlord and Tenant Act, a written agreement which clearly outlines obligations and responsibilities of both homesharers should be completed. There is no particular law covering homesharing arrangements, so a written agreement with a termination clause is important (the agreement suggested for this program is provided in the

Homesharing Manual, Appendix A, page 26-27). The Landlord and Tenant Advisory Board may elect to arbitrate in very difficult homesharing disputes concerning eviction problems.

5.3 Operational Procedures

Operational procedures for the Edmonton Homesharing Program are detailed in the Homesharing Manual; consequently, this section provides only a brief overview of them.

5.3.1 Staffing and Volunteers

The pilot program was researched, set up, and evaluated by a contract researcher and implemented by one full-time staff person who was responsible for the following activities:

- establishing program activities and budget;
- implementing the program;
- conducting ongoing evaluation and implementing necessary changes;
- assisting in developing the procedures manual;
- assisting in the preparation of reports;
- recruiting, training, and working with program volunteers;
- developing a volunteer training manual; and
- liaising with appropriate community services and organizations.

5.3.2 Implementation Steps

The basic implementation steps required by the Counselling Model for Homesharing are as follows:

INTAKE / INTERVIEW
MATCH
COUNSELLING
FOLLOW-UP

A detailed flow chart representing the process for making a homesharing match is presented in Figure 5.1 on the following page.

Homesharing inquiries are usually received by telephone. A pamphlet is sent out if the caller wants/desires more information prior to completing an Intake Form which collects basic information about the applicant (sample forms are provided in the Homesharing Manual, Appendix A). If the applicant is appropriate for the program, an interview is scheduled; if not, the person may be referred to another agency or organization.

Applicants are interviewed extensively about their needs, expectations, and preferences in sharing. Evaluation forms are completed by the counsellor or volunteer to assist with matching. References are checked prior to any homesharing introductions.

Homesharers are matched on their geographical districts, preferences, interests, hobbies, backgrounds, and personalities. A trial period of one or two weeks is suggested before a final move. Once the match is established, regular follow-up is done and counselling is available for difficulties.

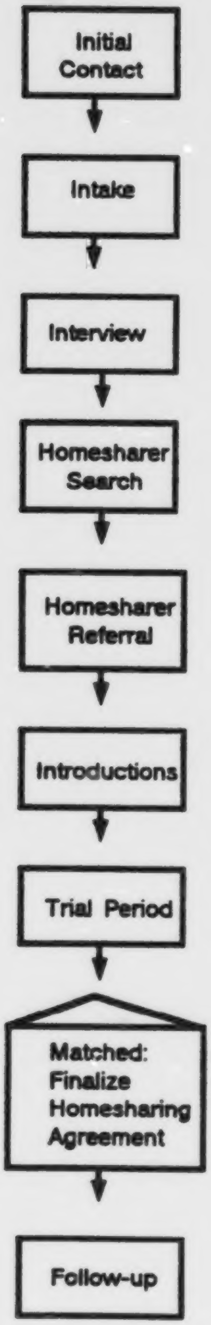
A file is kept for each applicant for statistics to determine program imbalances, promotional effectiveness, and evaluation.

5.4 Education and Marketing

There is an on-going need to continuously publicize homesharing throughout the life of a program. According to a survey of Edmonton seniors (as outlined in the previous section), only about half of the respondents were aware of homesharing as an option. In response, community awareness of homesharing was developed through the following activities:

- liason with various referral agencies (eg., community social services),
- information packages to various organizations (eg., community leagues, churches, senior drop-in centers),
- information seminars (eg., at drop-in centers),
- radio and television announcements,

Figure 5.1 The Process for Making Homesharing Matches


Initial Contact
Intake
Interview
Homesharer Search
Homesharer Referral
Introductions
Trial Period
Matched: Finalize Homesharing Agreement
Follow-up

Source: Adapted from the National Shared Housing Resource Centre, Philadelphia

- television features, and
- various promotional efforts (eg., media announcements, posters, brochures).

Promotional results are presented in Section 6 of this report.

6.0 PROGRAM EVALUATION

6.1 Pilot Program Statistics
6.2 Pilot Program Goals
6.3 Cost-effectiveness of the Program

6.0 PILOT PROGRAM EVALUATION

The Edmonton Homesharing Pilot Program ran from September 15, 1987 to September 15, 1988. Although the initial focus of the program was on senior-senior (peer) matches, younger applicants who showed interest were accepted. Consequently, the program developed into a fully intergenerational approach during the later six month period.

This section discusses the evaluation of the pilot program in quantitative terms and discusses the Pilot Program's cost-effectiveness. Quantitative units of service were adapted from the Shared Housing Resource Center in Philadelphia and used to measure program success. They included:

- number of inquiries,
- program awareness (promotional effectiveness),
- number of referrals from other agencies,
- number of referrals to other agencies,
- number of intakes,
- number of homeprovider interviews,
- number of homeseeker interviews,
- number of introductions,
- number of agreements signed,
- number of matches,
- number of matched homesharers,
- number of counselling sessions, and
- number of follow-ups.

The above services were also broken down by:

- homeproviders,
- homeseekers,
- age,
- district or area, and
- staff person or volunteer.

6.1 Pilot Program Statistics

The findings of the pilot program evaluation are presented according to the above mentioned measures of success. Statistics are generally provided on a monthly basis and detailed figures are available in Appendix D. Recall that ***seniors*** were defined as those people 55 years of age or older. Also note, the initial and the last month of the program were half months (September 15, 1987 to September 15, 1988), and that the first month was primarily devoted to operational functions.

6.1.1 Inquiries

Four hundred and four people inquired about homesharing. Approximately three times as many senior as non-senior homeproviders inquired about the program over the year -- 214 versus 67. In comparison, 71 senior homeseekers and 52 non-senior homeseekers inquired about the homesharing program.

Figure 6.1 (page 49) shows inquiries for homeproviders over time; figure 6.2 shows homeseekers. Inquiries reflect promotional efforts and seasonal effects. Major promotional and educational efforts were conducted during the first half of the program. Homeseekers have been the group more difficult to reach because of their diverse nature (age, income, current housing etc.).

6.1.2 Program Awareness

People inquiring about homesharing were asked where they had heard about the program. Figures 6.3 to 6.5 on page 50 show information sources broken into three major categories -- formal, informal, and publicity sources. Formal sources include referrals from health care, social service, or seniors agencies or organizations. Informal sources are family, friends, church, or other homesharers. Publicity sources include various promotional efforts such as media, posters, brochures, and information presentations.

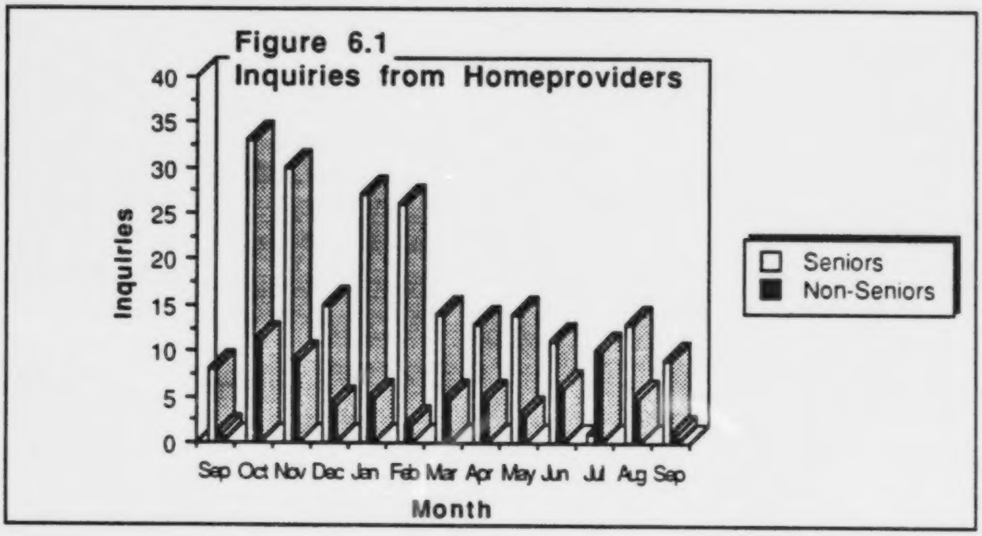


Figure 6.1
Inquiries from Homeproviders

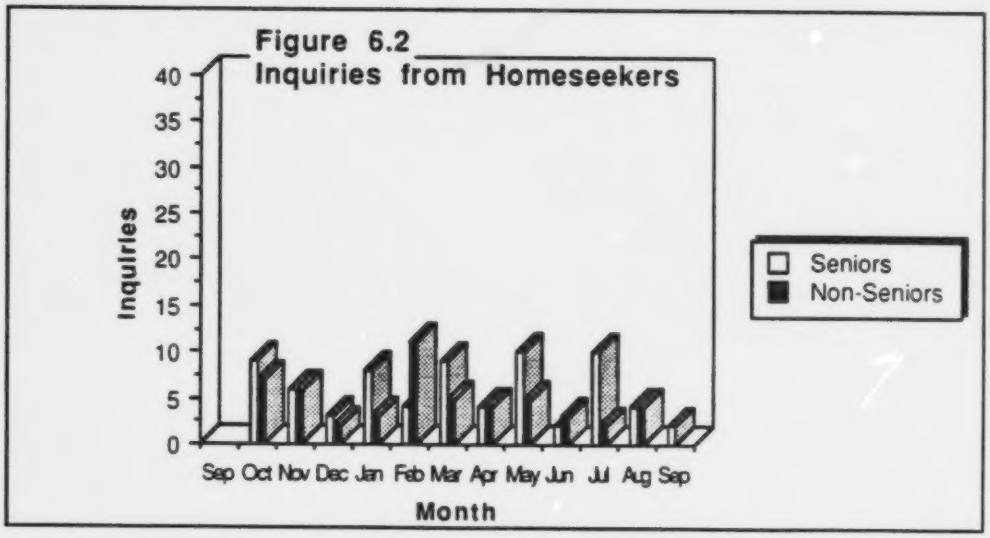


Figure 6.2
Inquiries from Homeseekers

Figure 6.3 Program Awareness from Formal Information Sources (by Age)

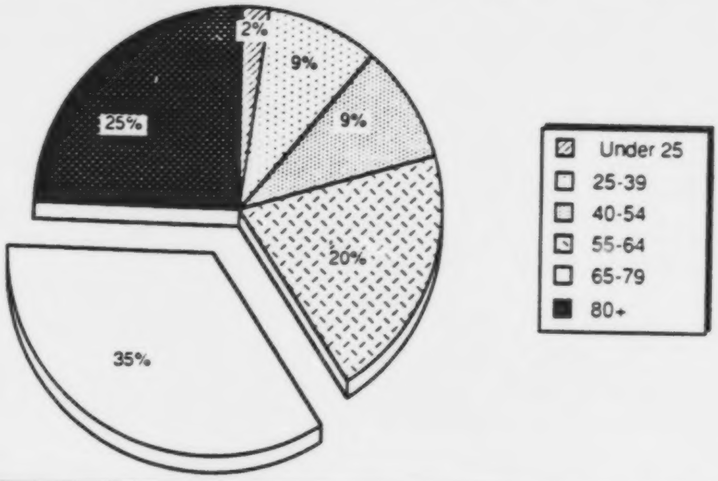


Figure 6.4 Program Awareness from Informal Information Sources (by Age)

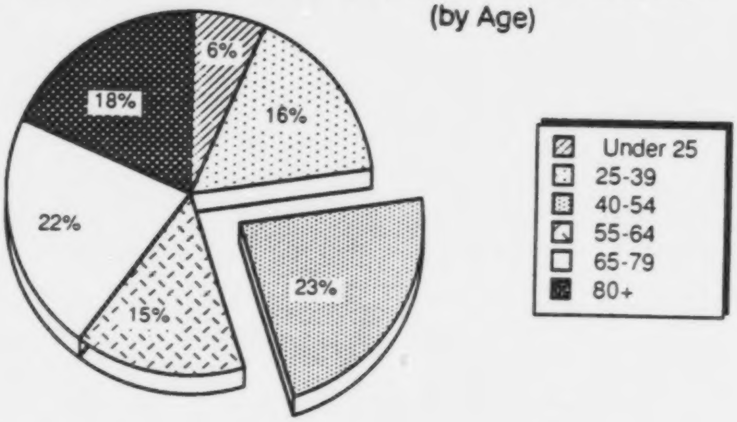
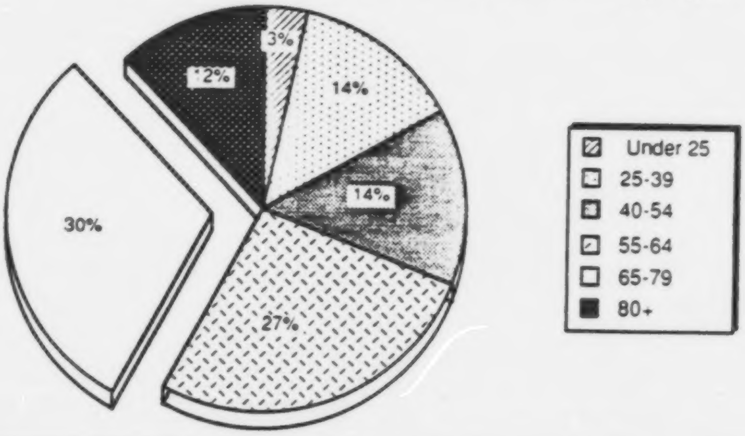


Figure 6.5 Program Awareness from Publicity Efforts (by Age)



The highest percentage of people under 40 heard about the program through informal sources. In contrast, for those inquirers between 40 and 54 years of age, the major source of information was publicity. And for those inquirers 65 and over, the major source of information about the program tended to be from formal sources.

6.1.3 Intakes

Monthly intakes do not necessarily relate to inquiries because many people, particularly seniors, are not in a hurry to make such a decision and may think about it for some time. The high number of intakes in February reflected promotional efforts; in July, students looking for accommodation.

Of the 253 intakes, twice as many were homeproviders versus homeseekers (Figures 6.6 and 6.7 on page 52). Of the homeproviders, 142 were seniors and 28 non-seniors. By comparison, 40 homeseeker intakes were seniors and 43 non-seniors. In addition, 20 homeproviders (19 seniors) and 4 senior homeseekers were referred to other more suitable community programs.

6.1.4 Interviews

Two hundred interviews were conducted with applicants to the homesharing program. Homeproviders comprised the majority of applicants (139) with 114 senior and 25 non-seniors. The remaining 61 interviews encompassed 27 senior and 34 non-senior homeseekers.

Figures 6.8 and 6.9 on page 53 provide monthly interview information. No interviews were conducted until October as the first month of the program was devoted to organizing and promotional efforts. The program focused on promotion and interviews in the first six months to build a pool of applicants.

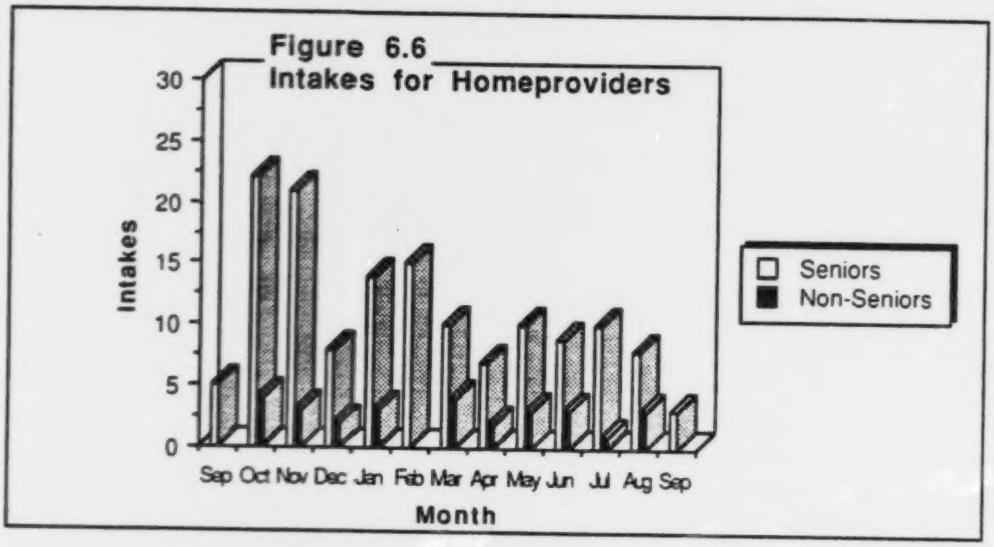


Figure 6.6
Intakes for Homeproviders

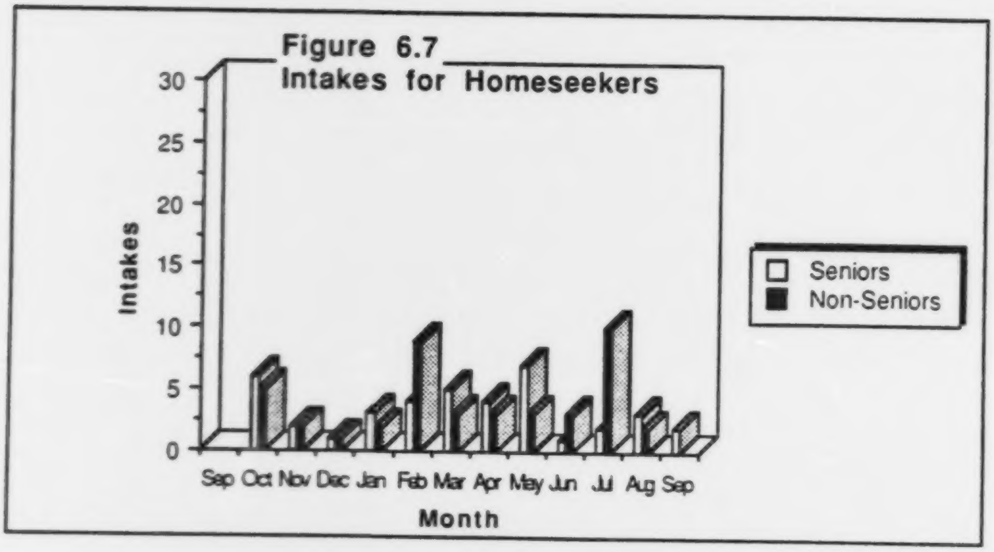


Figure 6.7
Intakes for Homeseekers

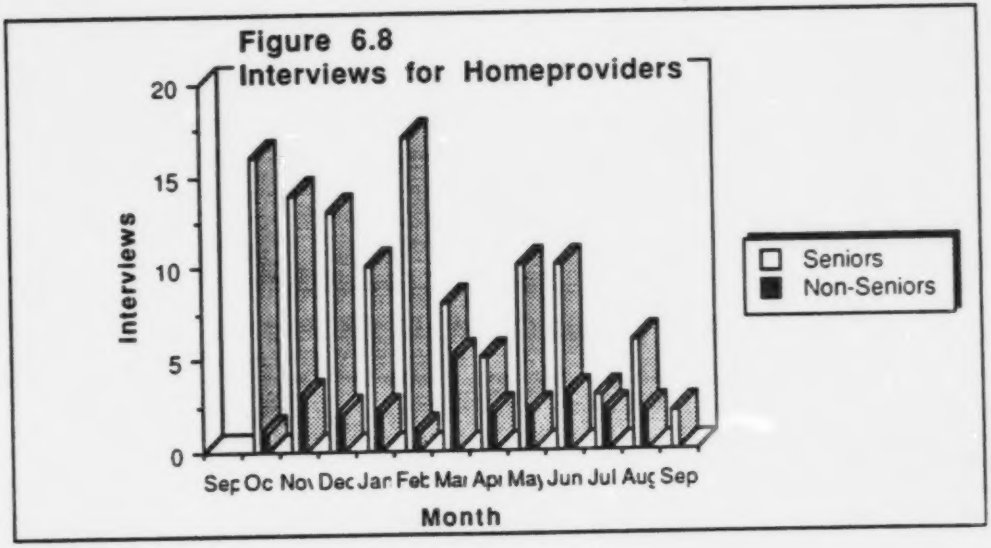


Figure 6.8
Interviews for Homeproviders

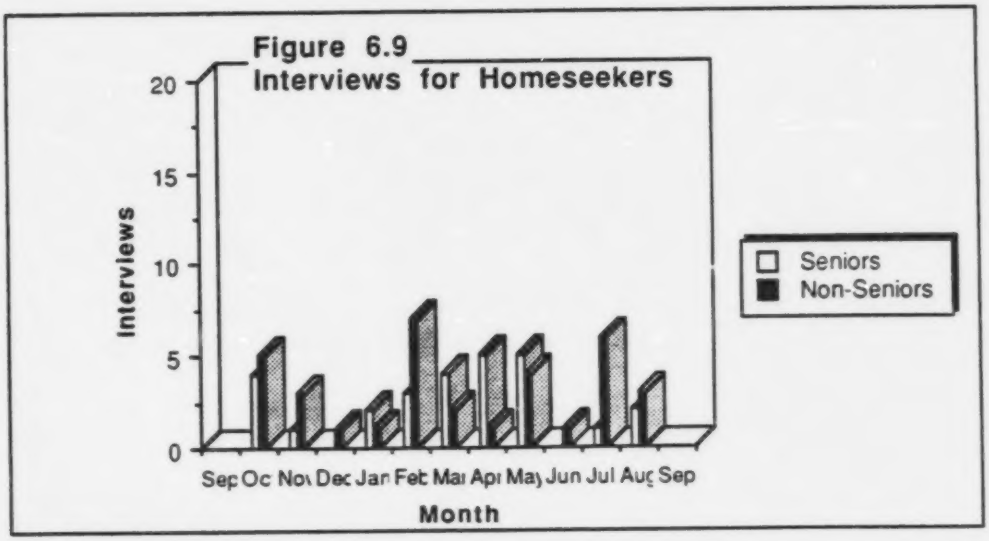


Figure 6.9
Interviews for Homeseekers

6.1.5 Demographic Profiles of Applicants

Tenure

Seventy percent of applicants were homeproviders, 30 percent homeseekers (Figure 6.10 page 55).

Sex/Status

The majority (63%)of homeproviders were female (Figure 6.11 page 55) . The remaining homeproviders were males, couples, or families (often single parents looking for a grandparent figure). Two-thirds of the homeseekers were female.

Age

As Figure 6.12 on page 56 indicates, the vast majority (82%) of the homeprovider applicants were 55 years of age or older. The highest percentage however, fell within the 65 to 79 year category.

In contrast, almost 80 percent of homeseeker applicants fell within the under 25 to 64 year categories. The highest percentage (30 %) of homeseekers were aged 40 to 54.

Location

As indicated in Figure 6.13 (page 57) , the areas with most homeprovider applicants were Southeast, North, and West Edmonton. In comparison, most homeseeker applicants were from the Southwest (which includes the University area), Central, and Southeast Edmonton.

In terms of homeseekers, over one-third (36%) would like to share a home in Southwest Edmonton (Figure 6.14 page 57). This reflects in part the preference of students to be in close proximity to the University. However, there are more homeseekers with this preference than there are homeproviders. Many homeowners in this area rent suites to students or have no desire to do so because of past difficulties or experiences. The remaining

Figure 6.10 Tenure of Applicants

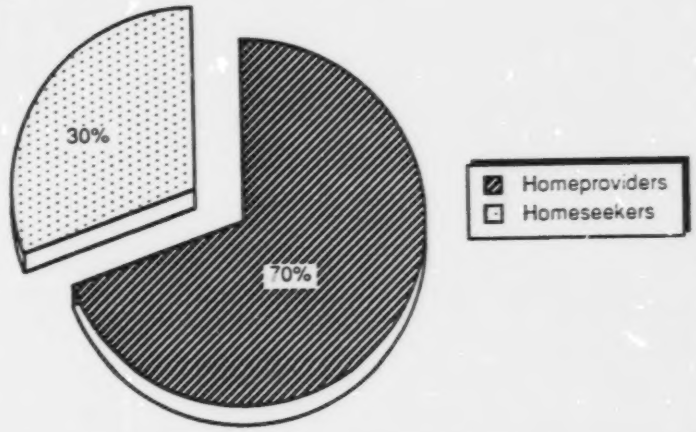


Figure 6.11 Sex/Status of Applicants

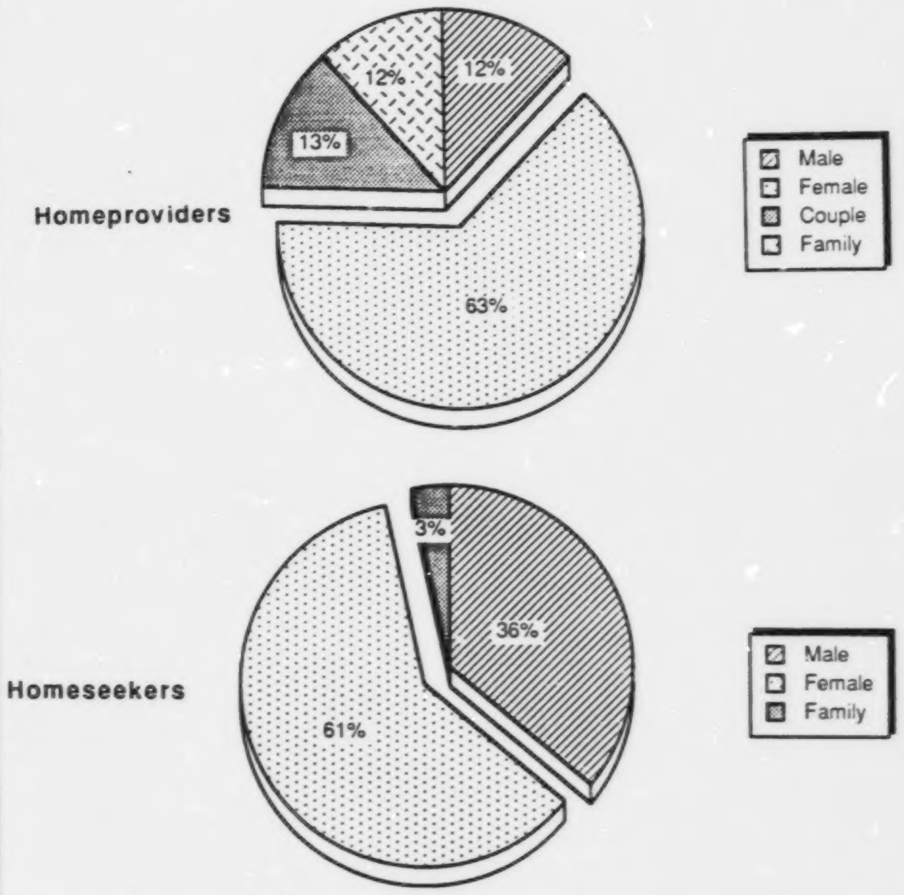


Figure 6.12 Age of Applicants

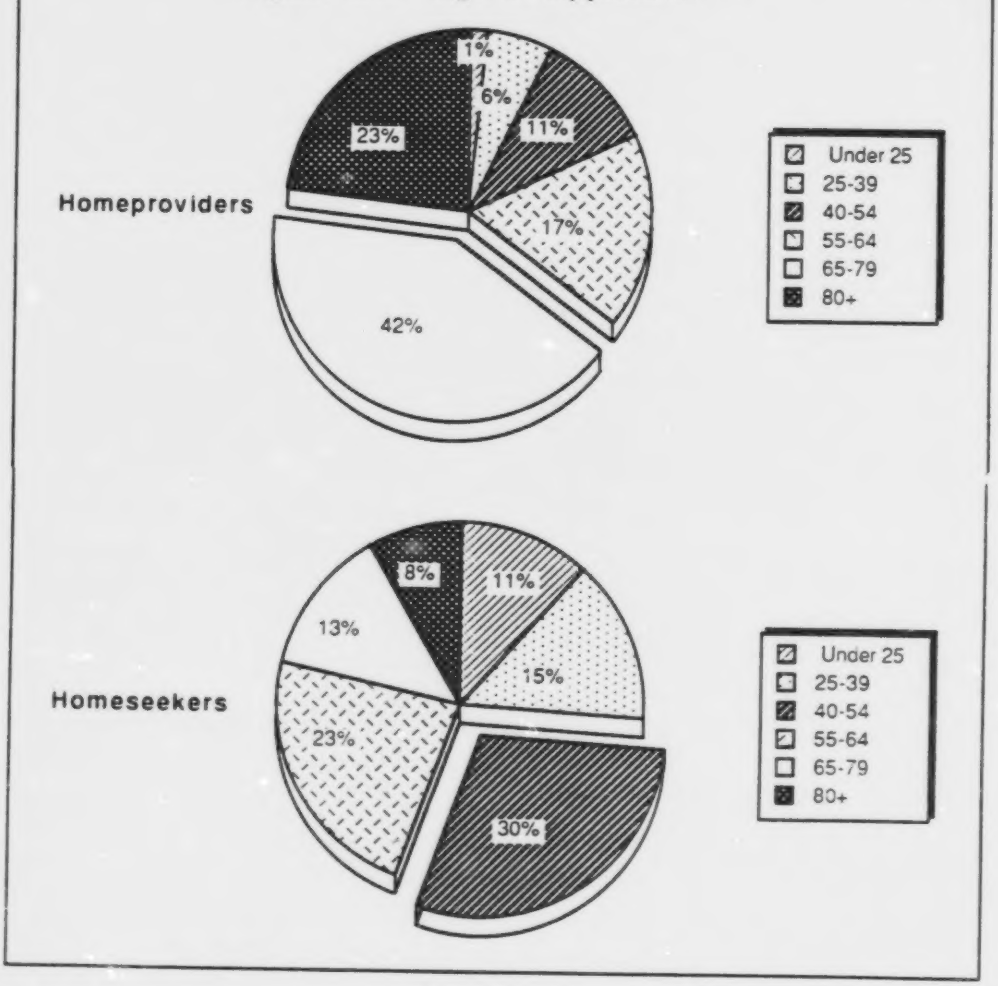
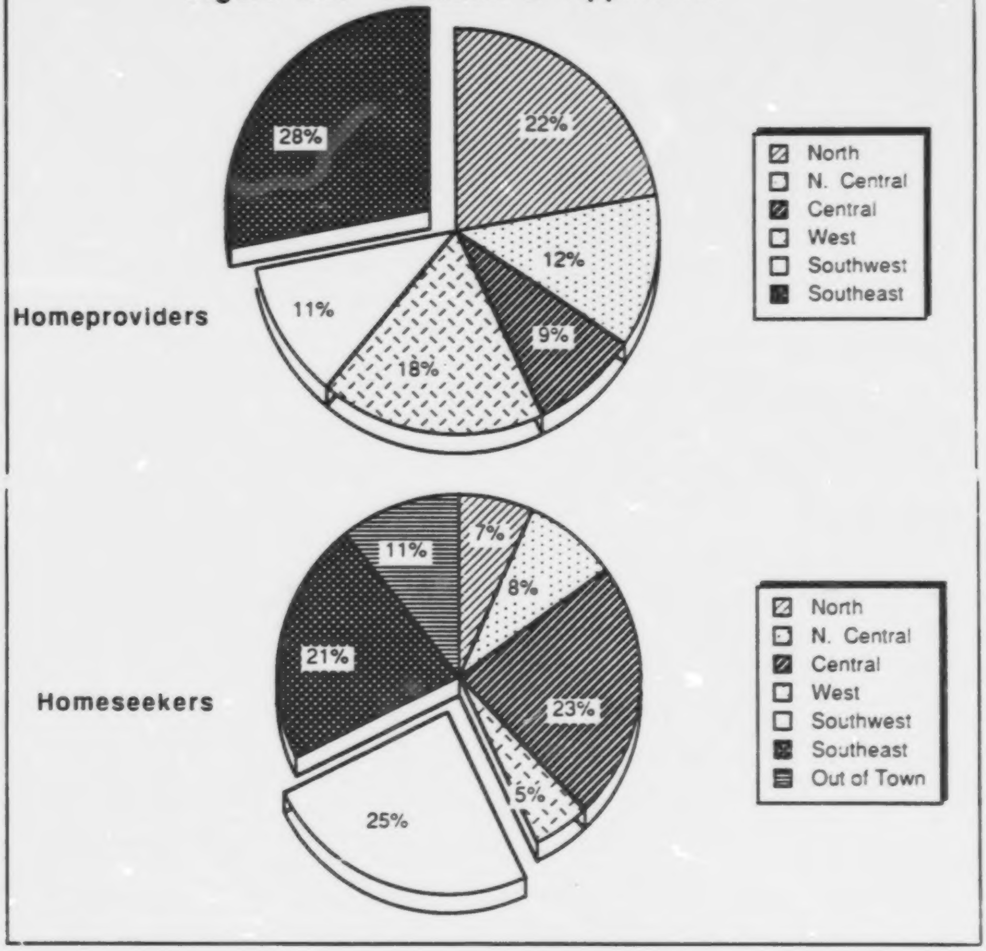
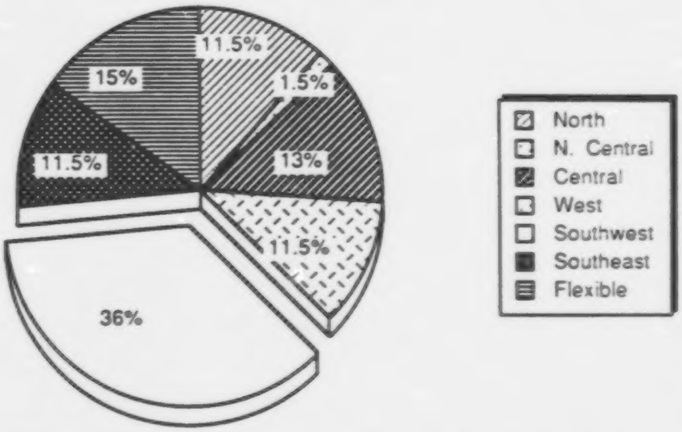


Figure 6.13 Location of Applicants


Homeproviders

Homeseekers

Figure 6.14 Preference Area of Homeseekers



area preferences are fairly equal, including 15 percent who indicated they were flexible in where they would like to live.

6.1.6 Reasons for Homesharing

Program applicants were asked why they wished to homeshare. Homeproviders wanted to remain in their own homes but have several additional reasons for sharing. Younger (i.e., under 40) homeprovider applicants mainly wanted to reduce the cost of shelter. Those 40 to 54 share primarily for companionship and/or financial reasons, while those in the 55 to 64 category share primarily for companionship, less for financial reasons. In contrast, most 65 to 79 year old homeproviders wished to share primarily for companionship. Many women lose their spouses during this age period and may become isolated in their homes. Many also indicated they require some assistance with household duties and would feel more secure/safe having someone else in the home. Homeproviders in the 80+ category shared primarily for assistance with household duties but also for companionship.

6.1.7 Introductions

A significant proportion of the pool of applicants (30 percent of the pool or 59 people) was introduced during the pilot program -- 40 seniors and 19 non-seniors. More specifically, 31 homeproviders (28 of which were seniors) were introduced to 28 (12 of which were seniors) homeseekers (Figures 6.15 and 6.16 page 59). No introductions were made in the first four months because according to the literature, a pool of at least 60 to 100 applicants is required prior to effective matching.

6.1.8 Matches

The introductions did not all lead to matches because of factors such as poor location, personality differences, high rent, or high service expectations. However, 20 percent of the people introduced were matched. Six matches were made during the pilot program. Six senior homeproviders were matched with three senior and three non-senior homeseekers. All homesharers signed homesharing agreements which set the terms of homesharing such as rent

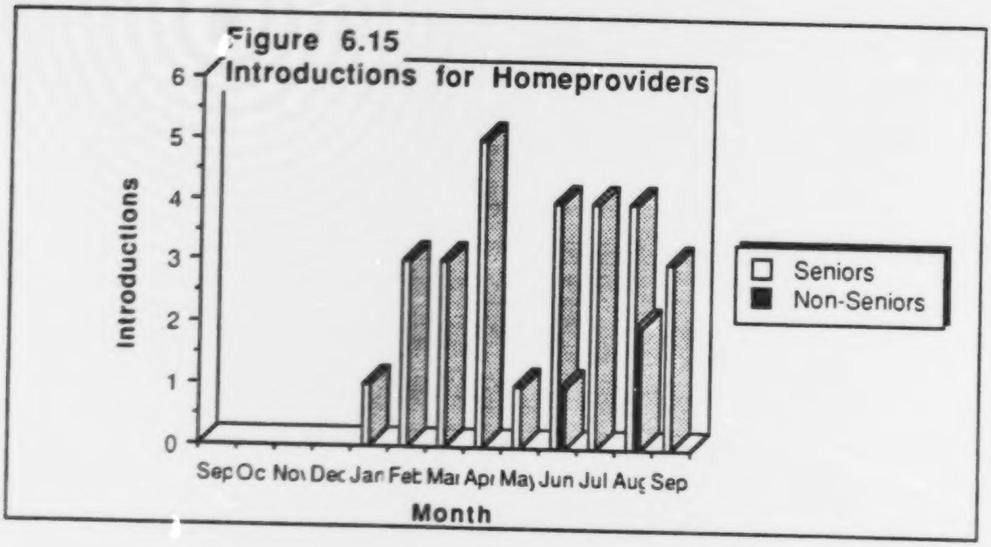


Figure 6.15
Introductions for Homeproviders

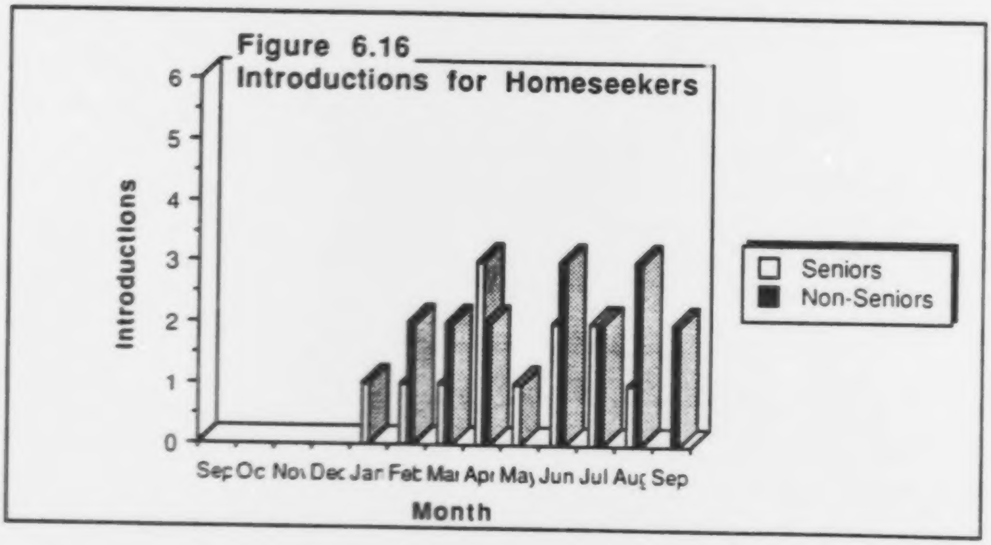


Figure 6.16
Introductions for Homeseekers

services exchanged, and notice requirements (if willing to exchange services for rent, a rate of $5.50 per hour is suggested). In addition, all homesharing matches involved a trial period prior to a homesharing arrangement.

Each match is profiled below.

Match #1

Mrs. S., a widowed 78 year old homeprovider with an income of less than $10,000 per year, needed someone for companionship and to help with yardwork and household maintenance. She was matched with Mr. K., a divorced 81 year old, who also wanted companionship and was willing, and still able, to do household maintenance. With an income within the $10,000 to $14,999 category he was willing to pay $150 per month rent and provide the requested services.

The match ended after 17 months because Mrs. S. was experiencing failing health and required additional assistance which Mr. K. was unable to give. Her son was looking for other support services or accommodation. Mr. K. was placed in another homesharing arrangement.

Match #2

Mrs. M., a 64 year old widowed homeprovider, wished to homeshare for companionship and security. With an income within the $15,000 to $24,999 category, she did not indicate sharing for financial assistance. She was matched with Mrs. V., a 66 year old separated lady with an income of less than $10,000 per year. Having lived in sheltered housing, Mrs. V. wished affordable accommodation and companionship.

The companionship was beneficial to both ladies and they complemented each other in terms of household responsibilities and social activities. However, the match only lasted one month because the homeseeker smoked more than the homeprovider's health could tolerate. In this month, Mrs. V. gained confidence and this arrangement had provided the "stepping stone" for her to live independently. Mrs. V. now resides in a senior citizens apartment.

Match #3

Mrs. D., a 68 year old widowed homeprovider with an income in the $10,000 to $14,999 category, wished to share for companionship, security, and assistance with outdoor maintenance. She was matched with Mr. M., a 41 year old separated man, who was unemployed and required affordable accommodation.

Mr. M. paid $150 per month and was expected to look after outdoor maintenance requirements. The match lasted 10.5 months and ended because the homeseeker took a job outside of Edmonton.

Match #4

Mr. and Mrs. R., a couple in their mid-sixties, with an income in the $15,000 to $24,999 category, wanted someone to look after outdoor maintenance and their house in the winter while they were away on vacation. They were matched with Mr. O., a 55 year old divorced man, who worked part-time and needed affordable accommodation. Mr. O. paid $200 per month.

The match lasted only 3.5 months because of late rent payments.

Match #5

Mrs. M., a 78 year old widowed homeprovider with an income in the $15,000 to $24,999 category, wished to share her home so that she would be able to leave the lodge she was living in. She required assistance with cooking and yardwork. Mrs. M. was matched with Mr. S., a 40 year old student who needed affordable housing. Mr. S., paid $75 per month for room and board in exchange for cooking dinner, shopping, and outdoor maintenance.

The match lasted only 2.5 months because of very high expectations on the part of the homeprovider.

Match #6

Mr. and Mrs. S., a couple in their mid-seventies with an income in the $10,000 to $14,999 category, wished to share their home in exchange for cooking and errands. Mrs. S. has Alzeimer's disease and Mr. S. has only one arm. They were matched with Mr. D., a 33 year old student who needed affordable accommodation. Mr. D. paid $25 per month for utilities.

The match was very successful and lasted one year but ended when Mrs. S. was placed in an auxillary hospital and Mr.S. moved into a seniors' apartment.

6.1.9 Counselling and Follow-up

Eleven counselling sessions to assist with problems were conducted with homesharers -- nine of which were with homeseekers. Matches #1, 2, and 4 required the majority of the counselling.

Twenty-five follow-ups (commonly telephone calls) were conducted with homeproviders, 29 with homeseekers. Follow-ups varied from making routine calls to inquire about how the match was working, to providing support or answering questions.

6.2 Pilot Program Goals

The program goals as outlined in Section 5 were met by the Homesharing Pilot Program. Another housing alternative was made available to Edmonton seniors which offers independence, privacy, companionship, assistance with household responsibilities, affordability, and increased security. Homesharing allows seniors to remain in their own homes and offers less advantaged people affordable accommodation. Homesharing is an option which also allows seniors self-sufficiency, which may delay institutionalization, and which decreases the need for community support services.

Table 6.1 on page 63 suggests that the goal for inquiries was unrealistically

Table 6.1 Homesharing Pilot Program Goals

HOMESHARING SERVICES	GOAL	RESULT	%
# of program inquiries	600	404	67
# of homeprovider interviews	140	139	99
# of homeseeker interviews	60	61	102
# of people introduced	30	59	197
# of matches	8	6	75
# of people matched	16	14	75
FOLLOW-UPS	56	54	96
REFERRALS BY OTHER COMMUNITY SERVICES			
# of persons who were matched	2*	4*	200

* Note that these numbers are included above.

Note: although 26 counselling sessions were estimated for the year, in fact, only 11 were required. This suggests the high degree of compatibility in most matches.

high. It was difficult to estimate the number of homesharing inquiries the Edmonton Program would receive; this goal was derived from a review of other programs in Canada and likely reflects a more established program with a higher promotional budget .

The estimated figures for interviews were accurate and more introductions were made than were anticipated. However, the number of matches was two short of the goal. This reflects a number of difficulties within the program: 1) having only one staff-person, 2) working with a large number of files (i.e., 200) to find compatible people using a number of variables, and 3) finding and training volunteers to assist with the program.

The number of counselling sessions required to deal with homesharers' problems was lower than expected. This reflects the effectiveness of the screening process and the number of variables considered in matching homesharers.

6.3 Cost-effectiveness of the Program

Prior to discussing cost-effectiveness of homesharing programs, it should be recalled that it requires a minimum of three years for such a program to become fully functional. It also requires an adequate budget to effectively promote the program so that people realize homesharing is an alternative.

As discussed in the Review of the Literature (Section 3), the average cost for homesharing programs in Canada is about $500 per homesharer matched. These programs, however, have been established for several years and a goal of three matches per month reflects this. However, with a goal of three matches per month involving six homesharers -- a reasonable goal by year three as discussed in Section 7 -- cost for the Edmonton Homesharing Program should also be in the $500 per homesharer range.

Cost-effectiveness may be analyzed in terms of comparative costs of other housing options subsidized by government. Eleven seniors involved in the six matches participated in a total of 2505 homesharing days. This averages $15.97 per day per senior based on the annual program budget of $40,000.

(This figure does not however, take into account sharers who are not seniors.) Other government programs are subsidized as follows (1985-86 figures from Mirosh, 1988):

• home care	$11 per hour
• lodge unit	$19.81 per day
• nursing home	$36.00 - $39.00 per day.

Although the cost-effectiveness of the Edmonton Homesharing Pilot Program falls between subsidies for lodges and nursing homes, it has the potential to be more cost-effective as the number of matches increases to a goal of 36 per year. Based on the same ratio of seniors to non-seniors found during the pilot program, 36 seniors could receive 8198 days of accommodation at a program cost of $40,000 or $4.88 per day per senior. This compares favorably with the figures noted above. In addition, the program should not only be justified from a monetary viewpoint but from a humanistic approach as well. Both homeproviders and homeseekers benefit from companionship and an increased feeling of security. Homesharing staff and volunteers also do a tremendous amount of community outreach through counselling and follow-up sessions.

The preference of seniors is housing of a residential nature. Privacy, independence, self-sufficiency, and remaining in their own homes are important to seniors. The goal to avoid institutionalization has led to a number of innovative housing solutions for seniors. The Edmonton Homesharing Pilot Program kept two seniors out of lodges, one out a nursing home, and three seniors from using supportive services such as Home Care.

In summary, the results of the Edmonton Homesharing Pilot Program were comparable to other new homesharing programs and generally reflect the findings in the Review of the Literature. The Edmonton Homesharing Program has the potential to become a feasible program which offers older persons, and others in the community, another affordable housing option within three years of initiation.

7.0 POTENTIAL MARKET FOR HOMESHARING

7.1 Target Market
7.2 Size of the Market
7.3 Influencing Factors

7.0 POTENTIAL MARKET FOR HOMESHARING

This section discusses the target market for homesharing, estimates the potential market for homesharing among seniors in Edmonton, and presents some factors which may influence a person's decision to homeshare. It does not attempt to estimate the market for younger homeseekers.

7.1 Target Market

The primary target market for homesharers is elderly (65 years of age or older) homeproviders living alone. Nearly 70 percent of seniors in Edmonton own their own homes and one in four lives alone. The literature conservatively suggests that a minimum of 6 percent of senior homeowners would seriously consider homesharing. A survey conducted by the Edmonton Homesharing Program indicated that 50 percent would consider homesharing if they could no longer manage on their own. It should be noted that respondent profiles were generally typical of the above target group.

Other target markets for the Edmonton Homesharing Program would include seniors who are not homeowners, students and single people who need affordable housing, and families who desire a grandparent figure.

7.2 Size of the Market

Using the above information, the estimated size of the potential market for seniors interested in homesharing in Edmonton is as follows:

Number of seniors 65 and over living in Edmonton = 47,000
Number of seniors living alone (25%) = 11,750
Number of 2 person senior households = 17,625

Number of senior households 29,375

About 68 percent of seniors living in Edmonton are homeowners. Therefore, approximately 20,000 homes are owned by seniors. Conservatively, assuming 6 percent of these homeowners would be interested in homesharing, 1200 senior households are potential homesharers at this time. If further estimates are based on homeproviders in the pilot program, homeproviders who live alone are twice as likely to become sharers as are two person households. Therefore, the current number of potential senior homeproviders is approximately 825 households.

A very conservative estimate of 825 senior households per year will seriously consider homesharing. However, not all of these seniors would complete the application process, nor would all of them be matched. At a goal of 5 percent of applicants becoming homesharers (the pilot program matched 3 percent of applicants), 41 senior households could be matched per year. Thus a goal of three matches per month should be realistic with adequate program promotion and community awareness.

7.3 Influencing Factors

Many factors may influence the decision to homeshare. These include:

- community awareness of the program,
- exposure to promotional efforts,
- waiting time to be matched,
- the economic situation,
- the availability of affordable housing,
- the availability of support services,
- suitable housing alternatives,
- recommendations of friends and relatives,
- reputation of the homesharing program,
- initial impressions of homesharing staff and volunteers, and
- compatibility of potential homesharers.

The above factors influence the decision to homeshare. A homesharing program which is sensitive to such issues is more likely to succeed in making homesharing a housing option for a significant number of seniors and others in the community.

8.0 SUMMARY AND RECOMMENDATIONS

8.1 Major Findings
8.2 Recommendations

8.0 SUMMARY AND RECOMMENDATIONS

The purpose of this study was to test the homesharing alternative through a pilot project and to recommend on the appropriateness and feasibility of the approach, and on conditions and procedures for implementing it.

The study focused on five major objectives listed in Section 1 which form the basis of the findings discussed below. These objectives included:

1) investigate the need for a homesharing program;
2) develop a proposal for a homesharing program and for operating procedures;
3) implement a homesharing pilot project;
4) evaluate the pilot project; and
5) develop a manual which would enable interested parties to establish a homesharing program.

8.1 Major Findings

8.1.1 The Need for a Homesharing Program

There is a need for such a homesharing program in Edmonton as indicated by an initial survey of seniors, interviews with seniors and individuals working the field of seniors' housing, the number of applicants to the program, and a survey of homesharers. There is both sufficient demand and supply of homes to support such an endeavor.

Most seniors wish to remain in their own homes but may experience some difficulties (eg., loneliness, isolation, safety concerns, maintenance problems, and household responsibilities). Because it may involve an exchange of services for rent, homesharing provides people in need of affordable accommodation with another housing option.

8.1.2 The Concept of Homesharing and Operational Procedures

For the purpose of this study, ***homesharing*** was defined as a housing arrangement in which two or more unrelated people pool some of their personal and financial resources in order to share a home.

The pilot program initially focused on ***peer*** matches (seniors sharing with seniors) but developed into an ***intergenerational*** one (younger people or seniors sharing with seniors) in response to demonstrated community need. The program does, however, require one of the homesharers in a match to be a senior (i.e., 55 years or older). Eligibility criteria were set according to the program goals and the target markets most in need of this service.

The Edmonton Homesharing Program was based on the Counselling Model developed by the Shared Housing Resource Center in Philadelphia. This model provides a larger scope of services beyond mere matches and as such, is more likely to produce compatible and enduring matches.

Operational procedures were established according to the Counselling Model. These procedures address staffing and volunteers, program implementation steps, and education and marketing. Detailed operational procedures are presented in the Homesharing Manual which supplements this report. The manual is intended to assist other interested parties in establishing a homesharing program.

8.1.3 Pilot Program

The Edmonton Pilot Homesharing Program was conducted from September 15, 1987 to September 15, 1988.

The primary target markets for the pilot program were:

- seniors who wish to share their homes because of loneliness, financial reasons, or desire to receive assistance with household duties,
- adults, typically between 45 and 65, in need of affordable housing,
- students or young adults in need of affordable housing, and

- families who want a grandparent figure.

The Homesharing Program was advertised and promoted through various means. Liason was also established among various community agencies and organizations who refer suitable candidates to the Homesharing Program.

8.1.4 Program Results

The program was evaluated in quantitative terms and included cost-effectiveness. A survey of homesharers will be conducted to determine whether they are satisfied with the match and whether their quality of life has improved.

Four hundred and four people inquired about homesharing. The highest percentage of people under 40 years of age heard about the program through informal sources such as friends or family, or through promotional efforts. Inquiriers between 40 and 54 typically heard about the program through advertising efforts. In contrast, older inquirers were often referred to the program through formal sources such as community service agencies.

Two hundred fifty-three intakes were accepted during the year. Of these intakes, 70 percent of applicants were homeproviders, the remainder homeseekers. Two hundred interviews were conducted with applicants to the program. The majority of homeproviders are older (65+), widowed females. Homeseekers are typically under 65 -- the highest percentage within the 40 to 54 year category. Two-thirds of the homeseekers are female, one-third male.

Homeproviders wish to homeshare primarily for companionship, assistance with household duties, and for security reasons. Homeseekers on the other hand typically want to share for financial reasons, although older seekers also want companionship.

Thirty percent of the applicants (59 people) were introduced as potential homesharers. Twenty percent of the introductions resulted in six matches involving 14 people. Three of the matches were peer, three were intergenerational. Counselling sessions and follow-ups were conducted with all homesharers.

8.1.5 Program Evaluation

Program goals were met by the pilot homesharing program. Another housing alternative was made available to Edmonton seniors which offers independence, privacy, companionship, assistance with household responsibilities, affordability, and increased security. Homesharing allows seniors to remain in their own homes and offers less advantaged people affordable accommodation. Homesharing is an option which also allows seniors self-sufficiency, may delay institutionalization, and which decreases the need for community support services. In addition, the goal of promoting self-help programs was met through the training and involvement of senior volunteers.

The program has the potential to become cost-effective in terms of comparative costs of other government subsidized housing options within the next two years. It should be noted that it generally requires three years for a homesharing program to become fully functional.

8.2 Recommendations

Because of the number of applicants and the amount of information gathered from each individual, it is recommended the Edmonton Homesharing Program be computerized. Agencies in British Columbia and Ontario have computerized their programs.

It is also recommended that the current program continue to be monitored and evaluated as an alternative housing strategy as it requires time for such a program to stabilize. If at the end of the demonstration period (under the Seniors Independence Program) homesharing is shown to be a viable alternative, The Society for the Retired and Semi-Retired should give consideration to seeking support for its broader introduction as a housing program within Alberta.

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APPENDIX A
Information Contacts

INFORMATION CONTACTS

Sister Kathleen Miller	Sisters of Our Lady of Charity
Mary Harasim	Edmonton Landlord and Tenant Advisory Board
Edmonton By-Law Enforcement	
Marc Dumouchel	University of Alberta Housing Registry
Doug Thompson	SRSR Lawyer
Cynthia Hannley	Edmonton Housing Authority
Daryl Kreuzer	Edmonton Social Services (ESS)
J.P. Lebourgeois	ESS
Dorothy Gulliver	ESS, Westmount District
Harold Ottosen	ESS, Westmount District
Germaine LaHody	ESS, Idylwylde District
Beverley Parker	ESS, Beverly District
Mary Engelmann	Senior Citizens' Secretariat
Chris Lawrence	Alberta Council on Aging
Noma Morrisey	Central Placement
Murray Kelcher	SRSR Board Member (accountant)
Bill Ritchie	Senior Citizens' Housing, Greater Edmonton Foundation
Maryann Flemming	Edmonton Center for Gerontology
Nora Keating	University of Alberta, Family Studies
David Spence	Ontario Ministry of Housing
Sylvia Goldblatt	Retired from CMHC, now a housing consultant in Ottawa
Gloria Gutman	Vancouver Center for Gerontology

Canadian Housing Information Center,
CMHC, Ottawa

Mary Gildea	Shared Housing Resource Center, Philadelphia
Mary McCabe	Edmonton Local Board of Health, Home Care and Aids to Daily Living
Nina Herman	Sharing, Toronto
Gillian Elcock	Vancouver Homesharers
Gail Casey	Project Coexistence, Montreal
Sharon Peebles	Ottawa Carleton Match and Share

APPENDIX B
Homesharing Questionnaire

Survey on Homesharing

n= 49 respondents

In mid-September, Carol Ip will be conducting interviews and assessments to match people interested in homesharing. If you are interested in obtaining more information, or would like to be matched for homesharing, please call the Housing Registry at the Society for the Retired and Semi-Retired at 423-5510.

Please help us to determine the interest and need for homesharing by filling in the following survey. There are no right or wrong answers. We want your honest opinions.

1. What do you think would be the major reasons people would
% be interested in homesharing? (check only three)
57 ☐ Companionship
22 ☐ Family not nearby
67 ☐ Affordability/financial sharing
48 ☐ Assistance with household duties n=46
50 ☐ Provide security/safety
7 ☐ Assistance with personal care
26 ☐ Help someone in need of accommodation
7 ☐ Other, specify: ____________________

2. Do you think there would be more disadvantages or advan-
% tages to homesharing? (check one)
20 ☐ More disadvantages
80 ☐ More advantages n=46

3. If you could no longer manage in your present accommodation (because of health, finances, loneliness, etc.) would you
% prefer to: (check one)
46 ☐ Move into a senior citizens' lodge
46 ☐ Share your home to be able to remain there
0 ☐ Move to a nursing home
2 ☐ Move in with your children/family n= 46
6 ☐ None of the above

4. How interested would you be in homesharing if the need arose and it allowed you to remain in your own home? (check
% one)
33 ☐ Very interested
48 ☐ Somewhat interested n= 46
13 ☐ Not at all interested]
6 ☐ Unsure] Skip to question 6

5. If you answered "very interested" or "somewhat interested"
% in question 4, would you prefer to be a tenant or provide your home for sharing? (Check one)
43 ☐ Tenant
57 ☐ Home provider n= 35

6. Do you think homesharing could be a desirable option for
% some seniors in Edmonton? (check one)
63 ☐ Yes, definitely
29 ☐ Maybe
2 ☐ No n= 48
6 ☐ Unsure

7. Were you aware of the idea of homesharing before the July
% issue of News for Seniors? (check one)
57 ☐ Yes
43 ☐ No n= 49

8. What type of accommodation do you now live in? (check
% one)
59 ☐ House
29 ☐ Apartment
10 ☐ Condominium n= 49
0 ☐ Nursing home/lodge
2 ☐ Other

9. Marital status:
% 18 ☐ Married
16 ☐ Single n= 49
47 ☐ Widowed
18 ☐ Separated/divorced
(does not add to 100 due to rounding)

10. Sex
% 81 ☐ Female
19 ☐ Male n= 48

11. Age:
% 4 ☐ Under 55 years
23 ☐ 55-64
53 ☐ 65-75 n= 49
20 ☐ Over 75

12. Comments ____________________
____
____

Thank you for your opinions and time. Please mail or drop off the survey to: The Society for the Retired and Semi-Retired, 10004 - 105 Street, Edmonton T5J 1C3

APPENDIX C
Homesharing Agencies in Canada

HOMESHARING ORGANIZATIONS IN CANADA (1988)

Carol Ip
Coordinator of Homesharing
Society for the Retired and
Semi-Retired
15 Sir Winston Churchill Square
Edmonton, AB T5J 2E5

Colin Collette
Coordinator
Dartmouth Share
45 Ochterloney Street
Dartmouth, NS B2Y 4M7

Debra MacLeod
Co-ordinator
Senior Citizens Centre
619 Bay Street
Sault Ste. Marie, ON

Gail Casey, Coordinator
Project Coexistence
Catholic Community Services
1857 De Maisonneuve Blvd. W.
Montreal, PQ H3H 1G9

Elaine Shearer, Coordinator
Single Mothers Housing Network
Richmond Family Place
6560 Gilbert Road
Richmond, BC V5C 3V4

Lee Salmond, Coordinator
Homeshare Waterloo Region
10 Water St. N.
Kitchener, ON N2H 5A5

or
Marisa Trivieri, Community Worker
Reg. Niagara Senior Citizens
c/o Community Support Services
163 First Avenue
Welland, ON L3C 1Y5

Lola Salmon
Niagara Homeshare
P.O. Box 1042, 2201 St. David's Road
Thorold, ON L2V 4T7

Nancy Green
Home Share Program
City of Brockville
Victoria Building
Brockville, ON K6V 3P5

Ms. Pellerin, Ms. Lesage, and
Mr. A. Descorteaux
Habitation Partagees
220 Duquette Quest
Gatineau, PQ J8P 2Z4

Nina Herman
Executive Coordinator
Toronto Sharing
212 - 339 Bloor Street W.
Toronto, ON M5S 1W8

Sharon Peebles, Coordinator
Match and Share
Regional Municipality/Ottawa
222 Queen Street
Ottawa, ON K1P 5Z3

Liz Burgess, Coordinator
Vancouver Homesharers Society
105 - 2182 West 12th Ave.
Vancouver, BC V6K 2N4

Mary Bell Plouffe
Seniors Counselling and
Coordination Service
318 Stewart Streer
Peterborough, ON K9J 3N1

Ms. Erna Kervin
North Bay Home Share Program
c/o Emmanuel United Church
North Bay, ON P1A 2C5

HOW DOES THE SERVICE WORK?

- *Introductory information sessions*
- *An application is filled out*
- *An interview is scheduled*
- *A meeting with a suitable match is arranged*
- *A homesharing agreement is completed*
- *A trial period is set*
- *Follow-up contact is available*

COST?

C3

Because the Society is a non-profit organization, there is no cost or fee for this housing service. Donations are always welcome.

FOR MORE INFORMATION:

Contact the Housing Registry, The Society for the Retired and Semi-Retired at ***423-5510*** *weekdays from 9 a.m. to 4:30 p.m.*

COMMENTS FROM HOMESHARERS

- *"Safe housing is difficult to find in the city. I feel more secure sharing my home than living alone."*
- *"I feel like I should have done this before. It's nice to share your home and build friendships with people you enjoy."*
- *"Sharing household chores takes a lot of worry off my shoulders.... I can't do everything for myself anymore."*
- *"I'm working my way through school, and saving money is a must. I get more house for less dollars."*
- *"For the first time, I have my own bedroom which is really nice. I come from a family of eight children and ... I couldn't afford to live in an apartment on my own so something like this worked out really well for me."*
- *"I decided to share a home because I was suddenly without a family. I was terrified to be alone."*
- *"Like many other women my age, I have outlived my family and have faced the dilemma of having to choose either to maintain my home alone or move into an institution. I choose instead to share my house with others and it is a wonderful experience."*
- *"I have enjoyed some help with the yardwork."*

HOMESHARING

A SERVICE PROVIDED
BY THE
SOCIETY FOR THE RETIRED
AND SEMI-RETIRED

10004 - 105 Street
Edmonton, Alberta
T5J 1C3

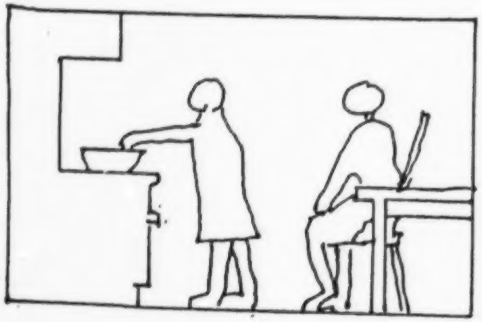
Telephone (403) 423-5510

WHAT IS HOMESHARING?

Homesharing is a housing arrangement in which a homeowner or apartment dweller shares extra living space with an unrelated person(s).

HOMESHARING IS:

- *A housing alternative for all ages, although one person must be 55 years or older*
- *For people who wish to help others with affordable housing*
- *For those who wish to remain in their own home but find it becoming more difficult to manage*
- *For people who do not wish to live alone*



WHY SHARE?

IF YOU NEED HOUSING, HOMESHARING OFFERS YOU:

- *The chance to SHARE a pleasant home*
- *An affordable housing alternative*
- *Shared responsibilities*
- *Companionship*
- *An opportunity to help others*

IF YOU HAVE ROOM TO SHARE, HOMESHARING OFFERS YOU:

- *A chance to help others*
- *Added income to help with expenses*
- *Assistance with household responsibilities*
- *Companionship*
- *Increased security*
- *Continuing independence*

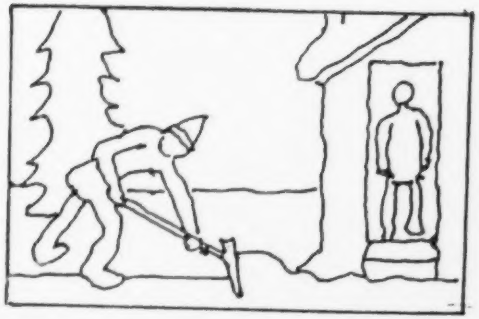
WHO CAN USE THIS SERVICE?

***TENANTS** who are:*

- *Adults of all ages*
- *Students*
- *Couples*
- *Families*

***HOMEOWNERS** who:*

- *Want to cut their housing costs*
- *Would like companionship*
- *Want increased security*
- *Desire help with household responsibilities in exchange for reduced rent*



APPENDIX D
Pilot Program Statistics
Map of Edmonton Homesharing Districts

Statistics for Figure 7.1 Inquiries from Homeproviders
Figure 7.2 Inquiries from Homeseekers

MONTH	HOMEPROVIDERS		HOMESEEKERS	
	Seniors	Non-seniors	Seniors	Non-Seniors
Sept 15/87	8	1	0	0
October	33	11	9	7
November	30	9	6	6
December	15	4	3	2
January	27	5	8	3
February	26	2	4	11
March	14	5	9	5
April	13	5	4	4
May	14	3	10	5
June	11	6	2	3
July	1	10	10	2
August	13	5	4	4
Sept 15/88	9	1	2	0
	214	67	71	52

Statistics for Figure 7.6 Intakes for Homeproviders
Figure 7.7 Intakes for Homeseekers

MONTH	HOMEPROVIDERS		HOMESEEKERS	
	Seniors	Non-seniors	Seniors	Non-Seniors
Sept 15/87	5	0	0	0
October	22	4	6	5
November	21	3	2	2
December	8	2	1	1
January	14	3	3	2
February	15	0	4	9
March	10	4	5	3
April	7	2	4	3
May	10	3	7	3
June	9	3	1	3
July	10	1	2	10
August	8	3	3	2
Sept 15/88	3	0	2	0
	142	28	40	43

Statistics for Figure 7.8 Interviews for Homeproviders
Figure 7.9 Interviews for Homeseekers

MONTH	HOMEPROVIDERS		HOMESEEKERS	
	Seniors	Non-seniors	Seniors	Non-Seniors
Sept 15/87	0	0	0	0
October	16	1	4	5
November	14	3	1	3
December	13	2	0	1
January	10	2	2	1
February	17	1	3	7
March	8	5	4	2
April	5	2	5	1
May	10	2	5	4
June	10	3	0	1
July	3	2	1	6
August	6	2	2	3
Sept 15/88	2	0	0	0
	114	25	27	34

Statistics for Figure 7.15 Introductions for Homeproviders
Figure 7.16 Introductions for Homeseekers

MONTH	HOMEPROVIDERS		HOMESEEKERS	
	Seniors	Non-seniors	Seniors	Non-Seniors
Sept 15/87	0	0	0	0
October	0	0	0	0
November	0	0	0	0
December	0	0	0	0
January	1	0	1	0
February	3	0	1	2
March	3	0	1	2
April	5	0	1	2
May	1	0	1	0
June	4	1	2	3
July	4	0	2	2
August	4	2	1	3
Sept 15/88	3	0	0	2
	28	3	12	16